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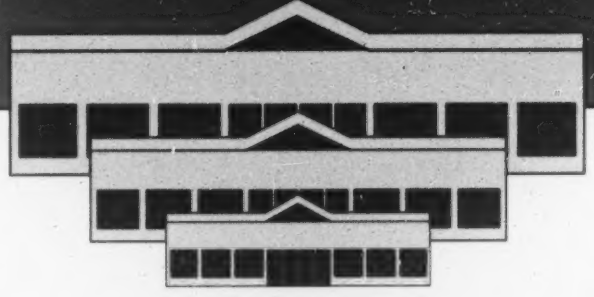
1993 FACTS ABOUT STORE DEVELOPMENT



FMI®
FOOD MARKETING INSTITUTE

1993

FACTS

ABOUT STORE DEVELOPMENT

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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education, industry relations and public affairs on behalf of its 1,500 members — food retailers and wholesalers and their customers in the United States and around the world. FMI's domestic member companies operate approximately 19,000 retail food stores with a combined annual sales volume of $190 billion — more than half of all grocery store sales in the United States. FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes 250 members from 60 countries.

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EXECUTIVE SUMMARY

The 1992 results give cause for optimism that the industry is rebounding from the recession. New construction recovered from a 10-year low of 2.9 percent of all stores in 1991 to 3.2 percent. Remodelings returned to pre-recession levels with 8.2 percent of all stores undergoing one in 1992. The 1992 increases indicate that the industry is making a slow but steady return to the development trends of the previous decade..

By other measures, store development continued on a stable course that dates to the late 1980s. The typical new store in 1992 measured 38,185 — on the low end of 38,000 to 42,000 square-foot range for the past five years. The same held true for individual formats — conventionals, superstores and combination stores — all of which have settled into steady ranges. Only warehouse stores continue to exhibit volatility with middle range for new stores in 1992 running from 26,600 square feet to 55,400 square feet.

Capital investment for remodelings has also stabilized at $50,000 in 1992 — similar to the previous two years and down sharply from the levels approaching half a million dollars in 1988 and 1989. On a square foot basis, remodeling costs decreased 20 percent to $25. The department most often added or expanded in a remodeling was the service bakery/deli, followed by a GM/HBC section and a scratch/bake-off bakery. New store construction costs dropped slightly to $71 per square foot — fairly evenly split between fixtures and decorations and building expenses.

Key Facts About Store Development, 1992

Percentage of Stores Constructed	3.2%
Percentage of Stores Closed	3.5%
Percentage of Stores Remodeled	8.2%
Median New Store Size	38,185 sq. ft.
Median Building Cost per Square Foot for New Stores	$39
Median Total per Square Foot for Fixtures and Decoration	$35
Median Total Construction Cost per Square Foot	$71
Median Total Capital Investment per Remodeling	$350,000

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1993)*

THE OPERATING CLIMATE

In 1992 the supermarket industry continued to grapple with adverse economic conditions in local markets, low sales growth and heavy competitive pressures from other store formats and supermarkets. Supermarket operators are fighting back with new stores, remodelings and acquisitions.

The median company in 1992 reported a sales increase of only 2.2 percent, compared with 3.1 percent for 1991, according to FMI's *Food Marketing Industry Speaks*. This 2.2 percent was the middle of a wide range. Some companies performed well, often by adding new stores to their operations. Identical store sales — sales of those stores open in both 1991 and 1992 — is a more accurate measure of industry since it factors out the impact of new and acquired stores. Median identical store sales increased 1.0 percent in 1992 over 1991. Behind the aggregate numbers, one finds that some companies excelled while others struggled. For example, almost 30 percent of the companies in this year's *Speaks* study reported sales declines from 1991 to 1992.

TABLE 1
ANNUAL SALES GROWTH, 1988-1992

YEAR	CURRENT DOLLARS (%)	REAL DOLLARS (%)
1988	6.9	2.6
1989	6.5	0.0
1990	5.3	-1.1
1991	3.1	0.5
1992	2.2	1.5

(Source: Food Marketing Institute, *Food Marketing Industry Speaks, 1993)*

TABLE 2
IDENTICAL STORE SALES GROWTH, 1988-1992

YEAR	CURRENT DOLLARS (%)	REAL DOLLARS (%)
1988	5.5	1.3
1989	5.3	-1.1
1990	3.7	-2.6
1991	0.3	-2.2
1992	1.0	0.3

(Source: Food Marketing Institute, *Food Marketing Industry Speaks, 1993)*

Competition from other store formats selling grocery products (warehouse clubs, discount drug stores, mass merchandisers) and from other supermarket companies is a major challenge for many companies — and this at a time when many markets are overstored. FMI surveyed some members in July 1992 and January 1993 to examine the effects of local economic conditions and competition for various classes of trade. The majority reported that competition from other formats selling groceries had a "somewhat negative" effect on their business. Supermarket companies are meeting these challenges with aggressive remodeling efforts and new stores, either newly constructed or acquired from another company.

Heavy debt loads are still a factor for some supermarket companies that were involved in leveraged buyouts in the 1980s. Data from FMI's *Annual Financial Review* indicate that the aggregate industry debt–to–equity ratio reached its highest level in the 1988-89 fiscal year (4.54). Although this number decreased to 3.71 in fiscal 1991-92, it was still considerably higher than the figures in earlier years (1.73 in 1985-86 for example).

STORE DEVELOPMENT TRENDS

Although the slow improvement in the U.S. economy continues to challenge supermarket companies and their customers, the store development trends provide the basis for some optimism. For the first time in five years, there was a modest 10 percent increase in the number of new stores constructed. For the past five years, the rate of new construction has fallen or remained constant. In 1992, however, 3.2 percent of all stores were newly built, up from an all-time low (since 1950) of 2.9 percent in 1991. The current rate of new store construction is now similar to that reported in 1985.

The historical trend lends perspective. The percentage of newly constructed stores was in double digits throughout the 1950s as the supermarket industry expanded after World War II. In the 1960s, from 7 percent to 9 percent of the stores were newly constructed each year. In 1971, this dropped to 5 percent — a number that has not been exceeded ever since.

The percentage of stores remodeled also increased in 1992 with 8.2 percent of stores undergoing a major remodeling (costing at least $50,000), up from 6.7 percent in 1992. The 22 percent increase over 1991 brings the remodeling rates in line with the 8-10 percent range reported since 1985. As in previous years, the remodeling rates are approximately five percentage points higher than the new construction rates.

Interestingly, 4.7 percent of the stores operated by responding companies in this year's *Facts* were acquired from other companies, meaning that 7.9 percent of the stores in operation at the end of the year were either newly built or had changed hands.

A slightly higher percentage of stores (3.5 percent) were closed in 1992, reversing the trend of the past three years in which slightly more stores were opened than closed.

TABLE 3
STORES NEWLY CONSTRUCTED, CLOSED, REMODELED, 1983-1992

	NEWLY CONSTRUCTED (%)	CLOSED (%)	REMODELED (%)
1992	3.2	3.5	8.2
1991	2.9	2.6	6.7
1990	4.0	3.3	9.1
1989	3.9	3.1	8.4
1988	4.2	6.8	8.6
1987	4.6	3.3	9.6
1986	3.9	4.6	9.5
1985	3.1	4.2	9.9
1984	4.1	6.9	4.3
1983	3.7	4.2	6.3

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1983 through 1993)*

STORE REMODELINGS

Costs

In 1992, the median total capital investment per store remodeled was similar to that reported for 1991, showing a slight 3 percent increase. There were still some extensive remodelings. Although most remodelings in the 1992 sample cost $500,000 or less, a few companies spent $1 million or more.

Overall, data for the past three years indicate that the supermarket remodelings are less dramatic in scope than was the case in the late 1980s. In 1990-1992, the capital investment amount has remained fairly constant and at a level significantly less than the costs reported by supermarket executives in the late 1980s. For example, in 1989, the median cost for a remodeling was almost $481,000. The 75th percentile was $977,000, meaning that 25 percent of the remodelings in the sample required a total capital investment of almost $1 million. In 1990, the median dropped to $320,000 and the 75th percentile to $715,200. In 1991, the median increased slightly but the 75th percentile dropped below $500,000.

The cost per square foot also spanned a wide range. Although the median was $25, some companies invested as much as $79.

Of those stores remodeled in 1992, the average number of years from the last remodeling decreased from eight years to seven years, continuing the downward trend begun in 1990. The median time from a store opening to the present remodeling remained at 10 years.

TABLE 4
STORE REMODELING COSTS, 1988-1992
TOTAL CAPITAL INVESTMENT

1988	$488,000
1989	$480,975
1990	$320,000
1991	$339,412
1992	$350,000

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1988 through 1993*)

TABLE 5
STORE REMODELING COSTS, 1988-1992
COST PER SQUARE FOOT

1988	$20
1989	$28
1990	$30
1991	$32
1992	$25

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1988 through 1993*)

Service Departments

Among those stores undergoing a major remodeling in 1992, the most frequently added or expanded service department was the service bakery/deli. Nearly 15 percent of the stores added this department in a remodeling. This was followed by expanded GM/HBC sections and a scratch/bake-off bakery. In recent years, companies have shown an increased tendency to add a service bakery/deli when remodeling while being less inclined to expand the GM/HBC department.

The service departments that were the least likely to be added in a 1992 remodeling:

- Greeting Cards
- Wine
- Pharmacy
- Photo Centers

TABLE 6
SERVICE DEPARTMENTS ADDED IN REMODELINGS

	1992 (%)	1991 (%)
Service Bakery/Deli	14.5	13.2
Expanded GM/HBC Sections	12.5	13.1
Scratch/Bake-off Bakery	10.2	3.9
Service Seafood	9.8	6.9
Prepared Foods	8.0	4.8
Floral/Plant Shop	8.0	7.9
Greeting Cards	4.4	6.3
Wine	3.9	1.4
Pharmacy	3.7	3.2
Photo Centers	3.2	2.5

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1992 and 1993*)

Additional Space

There was no significant change this year in the percentage of stores that have added space in a remodeling: almost 29 percent of those who remodeled added space, while 25 percent did so in 1991.

The median number of square feet of space added to a remodeled store dropped — from 8,050 square feet in 1991 to 7,300 square feet in 1992.

TABLE 7
ADDITIONAL SPACE IN STORE REMODELING

	1992	1991
Remodels That Added Space	28.7%	24.9%
Median Square Feet Added to Remodeled Stores	7,300	8,050

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1992 and 1993*)

NEW STORE DEVELOPMENT

New Store Size

The size of new stores has been an important indicator of overall trends in supermarketing. In 1980, the typical new store sampled by FMI passed the 30,000–square–foot mark (33,000 square feet compared with 27,400 in 1979) and climbed steadily to a high of almost 47,000 square feet in 1987. With their growth came myriad specialty and service departments and nonfoods. In 1988, the median new store size dropped to 40,800 square feet. Since that time, the typical new store has ranged in size from 38,000 square feet to 42,000 square feet. The 1992 median of 38,185 square feet continues this trend, which confirms that store development has stabilized after the phenomenal growth of the early to mid-1980s.

TABLE 8
MEDIAN NEW STORE SIZE (SQUARE FEET), 1983-1992

1992	38,185
1991	42,000
1990	38,000
1989	40,000
1988	40,800
1987	46,892
1986	43,830
1985	40,000
1984	39,800
1983	38,185

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1983 through 1993*)

Although the overall median provides a useful indicator of industry trends, it is important to look further at the numbers particularly in light of the wide variety of store formats. FMI examines four basic types of stores:

- Conventional supermarkets — full-line, self–service supermarkets of 30,000 square feet or smaller in total size
- Superstores — supermarkets larger than 30,000 square feet and generally with expanded food and nonfood sections
- Combination stores — supermarkets larger than 30,000 square feet with at least 25 percent of the total devoted to nonfoods

- Warehouse stores — supermarkets with utilitarian features that emphasize price over customer service.

For the new conventional stores, the median size remained unchanged at 29,000 square feet in 1992. The size of conventional stores has remained fairly constant over the past 10 years, showing an overall increase of 10 percent. It is important to note that the conventional store data were influenced by a large number of stores built by one FMI member. However, data reported by other companies show a similar typical size.

Median new superstore size increased moderately from 43,418 square feet in 1991 to 45,550 square feet in 1992. This may represent a new trend from the previous five years in which the typical new superstore ranged between 40,000 and 43,500 square feet.

Combination stores are generally the largest of the four formats. The median new combination store, at 60,860 square feet, increased by 25 percent over 1991. (The 1991 figure of 48,887 was the lowest for combination stores since 1982.) However, the middle range of the data shows that 50 percent of the new combination stores were between 48,000 and 61,300 square feet, similar to the middle ranges reported in the last three years.

TABLE 8
CONVENTIONAL STORE SIZE (SQUARE FEET), 1983-1992

	MEDIAN	MIDDLE RANGE	
		25th percentile	75th percentile
1992	29,000	29,000	29,000
1991	29,000	25,000	29,000
1990	25,000	24,750	29,000
1989	25,000	25,000	29,000
1988	29,000	25,000	29,000
1987	26,600	21,000	28,000
1986	25,000	25,000	25,000
1985	25,800	23,500	29,450
1984	22,100	21,500	22,021
1983	22,000	20,000	24,300

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1983 through 1993*)

TABLE 9
SUPERSTORE SIZE (SQUARE FEET), 1983-1992

	MEDIAN	MIDDLE RANGE	
		25th percentile	75th percentile
1992	45,551	36,751	50,000
1991	43,418	36,623	44,295
1990	43,000	38,000	44,050
1989	43,202	40,903	47,025
1988	42,000	40,800	50,581
1987	40,000	40,000	45,000
1986	43,390	40,000	57,000
1985	39,716	36,000	42,858
1984	40,000	34,000	43,000
1983	38,000	34,850	42,800

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1983 through 1993*)

TABLE 10
COMBINATION STORE SIZE (SQUARE FEET), 1983-1992

	MEDIAN	MIDDLE RANGE	
		25th percentile	75th percentile
1992	60,860	48,048	61,374
1991	48,887	45,000	62,942
1990	59,000	45,000	62,800
1989	58,432	51,613	72,400
1988	60,000	50,000	68,574
1987	52,430	53,430	52,430
1986	51,500	46,247	58,629
1985	58,225	42,982	61,000
1984	54,069	48,103	61,524
1983	49,457	44,800	50,250

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1983 through 1993*)

It is difficult to draw conclusions on warehouse formats. Retailers tend to build these formats in a great variety of sizes. Thus, the industry median is often more a function of the activities of individual companies in a given year rather than an indicator of trends. For example, the middle range in the 1992 sample ran from 26,600 square feet to 55,400 square feet.

Service Departments

Among the new stores built in 1992, five service departments were most likely to be included in a new store:

- Greeting cards
- Service bakery/Deli
- Scratch/Bake-off bakery
- Prepared foods
- Floral/Plant shop

Building Costs

This year, the median new construction cost per square foot totaled $71.04, a slight decrease from last year's cost. This number is the midpoint of a fairly wide range, with the middle 50 percent falling between $64.23 and $88.00.

In 1992, the median fixture and decoration costs for new stores decreased slightly to $35 per square foot.

Median new building costs decreased somewhat (7 percent) to $39 per square foot from last year's level of $42.

At $71 a square foot it would cost approximately $2.7 million to build a new typical 38,000 square foot store.

TABLE 11
NEW STORE COSTS PER SQUARE FOOT, 1988-1992

	Median Total Cost per Sq. Foot	Fixtures and Decorations	Building Costs
1992	$71	$35	$39
1991	$76	$37	$42
1990	$81	$40	$40
1989	$76	$37	$40
1988	$90	$39	$40

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1988 through 1993*)

Opening Inventory Costs Opening inventory costs vary widely by store size and format, with combination stores reflecting the greatest inventory cost, conventional the lowest and superstores in the midrange.

RENTAL AND LEASING ARRANGEMENTS

Rental and leasing arrangements are negotiated on a store-by-store basis. These cover overages, common–area charges and services provided by the landlord. The detailed charts beginning on page x of this report provide a store-by-store analysis.

The overall minimum rent per square foot for existing stores has continued to climb slowly for the past six years, increasing 9 percent in 1992 to $5.28 per square foot. As in 1991, the minimum rent for new stores decreased, in this case to $7.45 per square foot. This represents a 13 percent decrease from the previous year. The fact new store rents have become more competitive may reflect the decline in the commercial real estate industry.

Due to the increase in existing store rent and the decrease in new store rent, these rental prices have moved closer together, with existing store rent now nearly three-fourths that of the minimum rent for new stores. In previous years, the existing store rent has been closer to half that for new stores.

Expected total rent for existing stores has dropped about 8 percent to $7.53 per square foot, continuing the roller coaster pattern over the past six years. For new stores in the sample, the expected total rent was $7.65. For the first time since 1986, the expected total rent for new and existing stores was within a few cents of each other.

In 1992, overages as a percentage of sales averaged 13 percent lower than last year for existing stores, while it was higher by the same percentage for new stores. In 1992, existing stores paid an average of 0.92 percent of sales in overages while new stores paid an average of 0.66 percent of sales.

TABLE 12
MINIMUM RENT PER SQUARE FOOT

	Existing Stores	New Stores
1988	$4.14	$6.68
1989	$4.55	$7.85
1990	$4.50	$8.62
1991	$4.68	$8.36
1992	$5.28	$7.45

(SOURCE: Food Marketing Institute, *Facts About Store Development, 1988 through 1993*)

METHODOLOGY

The data in *Facts* are derived from FMI's annual studies of the food distribution industry. A postcard survey was sent to all FMI members and selected nonmembers to determine the extent of store development throughout the year.

Unless otherwise noted, all the data in *Facts* are medians. The median figure represents the midpoint for a particular measure, with one-half the figures above it and one-half below it. In calculating the median, the individual data are weighted by number of stores responding where applicable. The median is a good indicator of "typical" performance since it is not distorted by a few unusually high or low values that may exist in a sample due to special circumstances. In analyzing the data and comparing it with individual company performance, it is important to consider the "middle range." This represents the middle 50 percent of the responses.

The sample in the annual survey varies somewhat from year to year, so direct comparability is not entirely possible. Some of the year-to-year changes in the *Facts* figures may partially reflect a change in companies responding to the survey. However, FMI believes that the conclusions drawn from the annual *Facts* surveys represent an accurate picture of the general trends in supermarket development.

DETAILED RESULTS FROM FACTS ABOUT STORE DEVELOPMENT, 1993

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TABLE 13-1

PROFILE OF RESPONDENTS -- NUMBER OF SUPERMARKETS OPERATED

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	134	35	23	28	9	7	10	13	9
1 STORE OPERATORS	31.3%	91.4%	39.1%	3.6%	-	-	-	-	-
2 - 10 STORE COMPANIES	32.1	8.6	60.9	82.1	33.3	-	-	-	-
11 - 49 STORE COMPANIES	13.4	-	-	14.3	55.6	71.4	30.0	7.7	-
50 + STORE COMPANIES	23.1	-	-	-	11.1	28.6	70.0	92.3	100.0
INDEPENDENTS (1 - 10 STORES)	63.4	100.0	100.0	85.7	33.3	-	-	-	-
CHAINS (11 + STORES)	36.6	-	-	14.3	66.7	100.0	100.0	100.0	100.0

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 13-2

PROFILE OF RESPONDENTS -- NUMBER OF SUPERMARKETS OPERATED

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	134	10	13	29	8	21	8	11	19	15
1 STORE OPERATORS	31.3%	70.0%	30.8%	37.9%	62.5%	28.6%	25.0%	18.2%	26.3%	-
2 - 10 STORE COMPANIES	32.1	20.0	23.1	37.9	25.0	28.6	25.0	45.5	52.6	13.3
11 - 49 STORE COMPANIES	13.4	-	30.8	17.2	-	19.0	12.5	9.1	-	20.0
50 + STORE COMPANIES	23.1	10.0	15.4	6.9	12.5	23.8	37.5	27.3	21.1	66.7
INDEPENDENTS (1 - 10 STORES)	63.4	90.0	53.8	75.9	87.5	57.1	50.0	63.6	78.9	13.3
CHAINS (11 + STORES)	36.6	10.0	46.2	24.1	12.5	42.9	50.0	36.4	21.1	86.7

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 14
TYPE OF SUPERMARKETS AND NUMBER OF YEARS SINCE LAST REMODELING

	SUPERMARKETS IN OPERATION	AVERAGE NUMBER OF YEARS SINCE LAST MAJOR REMODELING
TOTAL	100.0	7.9
CONVENTIONAL STORES	56.7	7.4
SUPER STORES	27.2	7.5
COMBINATION STORES	12.2	7.2
WAREHOUSE STORES	3.3	6.4
OTHER	.7	5.8

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 15
PERCENTAGE OF STORE ACTIVITY IN 1992 BY TYPE OF STORE

	NEW	CLOSED	ACQUIRED
TOTAL	409 100.0	287 100.0	519 100.0
CONVENTIONAL STORES	42.5%	79.4%	55.7%
SUPER STORES	28.9	13.9	15.2
COMBINATION STORES	20.3	2.8	22.2
WAREHOUSE STORES	8.1	3.5	7.3
OTHER	.2	.7	

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 16
MEDIAN NUMBER OF YEARS FROM FIRST OPENING TO PRESENT REMODELING

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	10.0	7.0	15.0	71
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	14.5	12.0	23.0	10
10 - 30 MILLION	10.0	9.0	12.0	6
31 - 100 MILLION	6.0	5.0	11.0	14
101 - 250 MILLION	14.5	8.0	21.0	6
251 - 500 MILLION	13.0	7.0	19.0	7
501 - 999 MILLION	8.0	7.0	15.0	9
1 - 3 BILLION	11.5	10.0	15.0	12
OVER 3 BILLION	10.0	7.0	15.0	7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 17
MEDIAN NUMBER OF YEARS FROM LAST MAJOR REMODELING TO PRESENT REMODELING

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	7.0	5.0	10.0	71
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	5.0	3.0	6.0	10
10 - 30 MILLION	7.5	6.5	9.0	8
31 - 100 MILLION	6.0	4.0	12.0	14
101 - 250 MILLION	6.0	5.0	6.0	5
251 - 500 MILLION	8.0	7.0	8.0	6
501 - 999 MILLION	7.0	6.0	8.0	9
1 - 3 BILLION	7.0	5.0	10.5	12
OVER 3 BILLION	8.0	5.0	10.0	7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 18

MEDIAN OF TOTAL CAPITAL INVESTMENT PER SUPERMARKET PER MAJOR REMODELING

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$350000	$336000	$644762	839
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	168500	60000	300000	10
10 - 30 MILLION	260000	175000	425000	11
31 - 100 MILLION	205400	75000	450000	35
101 - 250 MILLION	550000	158000	1057651	16
251 - 500 MILLION	960000	632000	1000000	31
501 - 999 MILLION	395000	350000	550000	53
1 - 3 BILLION	197500	160469	500000	209
OVER 3 BILLION	467154	336000	644762	474

NOTE: DATA WEIGHTED BY NUMBER OF STORES THAT UNDERWENT MAJOR REMODELING

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 19

MEDIAN OF TOTAL CAPITAL INVESTMENT PER SQUARE FOOT PER MAJOR REMODELING

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	$24.77	$11.00	$60.00	76
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	12.95	8.00	61.00	8
10 - 30 MILLION	29.00	8.66	60.00	10
31 - 100 MILLION	16.00	7.41	59.25	15
101 - 250 MILLION	55.30	30.00	93.00	7
251 - 500 MILLION	38.00	21.33	60.00	7
501 - 999 MILLION	23.70	14.22	27.65	9
1 - 3 BILLION	30.47	11.94	109.00	12
OVER 3 BILLION	29.12	12.93	54.11	8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 20-1

PERCENTAGE OF STORES ADDING THE FOLLOWING FEATURES IN REMODELINGS IN 1992

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL STORES	904	10	11	35	16	31	53	209	539
SERVICE BAKERY/DELI	14.5%	20.0%	18.2%	14.3%	-	3.2%	18.9%	18.7%	13.4%
EXPANDED GM/HBC SECTIONS	12.5	20.0	18.2	25.7	31.3	80.6	39.6	18.2	2.0
SCRATCH/BAKE-OFF BAKERY	10.2	-	18.2	5.7	-	6.5	7.5	26.8	4.8
SERVICE-SEAFOOD	9.8	-	27.3	5.7	12.5	25.8	13.2	19.6	4.8
PREPARED FOODS	8.0	-	45.5	17.1	12.5	22.6	9.4	14.8	3.0
FLORAL/PLANT SHOP	8.0	20.0	27.3	17.1	12.5	29.0	5.7	11.5	4.3
GREETING CARDS	4.4	10.0	27.3	11.4	-	3.2	41.5	1.4	1.1
WINE	3.9	-	-	8.6	-	-	3.8	12.0	.9
PHARMACY	3.7	-	9.1	2.9	6.3	25.8	1.9	3.3	2.6
PHOTO CENTERS	3.2	10.0	-	8.6	-	9.7	11.3	3.8	1.5

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 20-2

PERCENTAGE OF STORES ADDING THE FOLLOWING FEATURES IN REMODELINGS IN 1992

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL STORES	904	6	34	108	12	134	258	64	107	181
SERVICE BAKERY/DELI	14.5%	-	-	1.9%	25.0%	18.7%	16.3%	1.6%	24.3%	17.7%
EXPANDED GM/HBC SECTIONS	12.5	-	17.6	16.7	25.0	5.2	6.2	21.9	3.7	24.9
SCRATCH/BAKE-OFF BAKERY	10.2	16.7	5.9	1.9	16.7	-	2.3	-	23.4	29.8
SERVICE-SEAFOOD	9.8	-	26.5	7.4	25.0	3.7	2.3	35.9	15.0	10.5
PREPARED FOODS	8.0	-	8.8	8.3	25.0	2.2	8.5	3.1	6.5	12.7
FLORAL/PLANT SHOP	8.0	-	17.6	9.3	33.3	2.2	8.5	7.8	-	12.2
GREETING CARDS	4.4	-	2.9	1.9	8.3	3.0	8.5	6.3	-	3.3
WINE	3.9	-	-	-	-	2.2	1.9	3.1	-	13.8
PHARMACY	3.7	16.7	23.5	4.6	16.7	.7	2.7	4.7	3.7	1.1
PHOTO CENTERS	3.2	-	11.8	3.7	25.0	-	.4	21.9	-	1.7

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 21-1

PERCENTAGE OF STORE REMODELINGS WHICH HAVE ADDED ADDITIONAL SPACE TO THE STORE

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL STORES	904	10	11	35	16	31	53	209	539
PERCENTAGE OF STORES WHICH HAVE ADDED SPACE TO THE STORE	28.7%	40.0%	54.5%	25.7%	68.8%	61.3%	30.2%	26.8%	25.6%

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

FACTS ABOUTS STORE DEVELOPMENT

TABLE 21-2

PERCENTAGE OF STORE REMODELINGS WHICH HAVE ADDED ADDITIONAL SPACE TO THE STORE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL STORES	904	6	34	108	12	134	258	64	107	181
PERCENTAGE OF STORES WHICH HAVE ADDED SPACE TO THE STORE	28.7%	33.3%	35.3%	25.0%	33.3%	38.8%	25.2%	46.9%	10.3%	30.9

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 22
MEDIAN SQUARE FEET OF SPACE ADDED TO REMODELED STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	7300	3582	7535	258
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION				3
10 - 30 MILLION	6000	5000	12000	6
31 - 100 MILLION	6000	4000	20000	9
101 - 250 MILLION	4773	1780	10000	11
251 - 500 MILLION	10500	7000	15500	19
501 - 999 MILLION	12000	3500	16000	16
1 - 3 BILLION	2465	2033	5588	56
OVER 3 BILLION	7300	4000	7535	138

NOTE: DATA WEIGHTED BY NUMBER OF REMODELED STORES ADDING ADDITIONAL SQUARE FEET

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

FACTS ABOUT NEW STORE DEVELOPMENT

TABLE 23-1
PROFILE OF NEW STORE CONSTRUCTION --MEDIANS

		GEOGRAPHIC REGION								
	TOTAL	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	383	19	17	30	5	190	12	28	65	17
TYPICAL TOTAL SQUARE FEET	38185	48000	40000	52885	54000	29000	52930	46254	52262	21000
TYPICAL SELLING AREA IN SQUARE FEET	30000	33600	30000	39664	40000	21200	39301	33765	39196	17000
TYPICAL BUILDING COST PER SQUARE FOOT	$39.00	$45.00	$40.00	$40.00	$30.00	$33.00	$36.72	$37.27	$40.43	$47.40
TYPICAL COST FOR STORE EQUIPMENT, FIXTURES AND DECORATIONS PER SQUARE FOOT	$35.00	$43.00	$48.00	$40.00	$25.00	$35.00	$32.50	$32.59	$30.61	$40.29
TYPICAL TOTAL CONSTRUCTION COST PER SQUARE FOOT	$71.04	$88.00	$87.83	$80.00	$55.00	$63.00	$64.23	$69.86	$71.04	$92.83

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 23-2
PROFILE OF NEW STORE CONSTRUCTION --MEDIANS

		TYPE OF STORE					LOCATION OF STORE			
	TOTAL	CONVEN-TIONAL	SUPER STORE	COMBI-NATION	WARE-HOUSE	OTHER	COMMUNI. REGIONAL	NEIGH. CENTER	FREE STANDING	OTHER
TOTAL	383	156	89	25	21	0	19	114	16	5
TYPICAL TOTAL SQUARE FEET	38185	29000	45551	60860	54000		48000	45551	23800	33000
TYPICAL SELLING AREA IN SQUARE FEET	30000	21200	33600	42962	40000		33600	38000	19000	20500
TYPICAL BUILDING COST PER SQUARE FOOT	$39.00	$39.50	$40.43	$36.72	$33.00		$47.00	$37.27	$55.30	$40.00
TYPICAL COST FOR STORE EQUIPMENT, FIXTURES AND DECORATIONS PER SQUARE FOOT	$35.00	$39.00	$36.00	$27.51	$30.50		$47.94	$32.59	$40.29	$40.00
TYPICAL TOTAL CONSTRUCTION COST PER SQUARE FOOT	$71.04	$75.00	$72.00	$60.42	$60.50		$91.83	$69.86	$95.59	$80.0(

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 24
MEDIAN TOTAL SQUARE FEET FOR NEW STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	38185	29000	52262	383
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION				0
10 - 30 MILLION				1
31 - 100 MILLION	22915	16415	32000	4
101 - 250 MILLION				3
251 - 500 MILLION	36000	18600	52000	11
OVER 500 MILLION	33000	29000	48048	322

Continued

TABLE 24
MEDIAN TOTAL SQUARE FEET FOR NEW STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
GEOGRAPHIC REGION				
NEW ENGLAND	48000	48000	65000	19
MIDDLE ATLANTIC	40000	40000	51205	17
EAST NORTH CENTRAL	52885	52885	52885	30
WEST NORTH CENTRAL	54000	54000	54000	5
SOUTHEAST	29000	29000	33000	190
WEST SOUTH CENTRAL	52930	45000	60860	12
MOUNTAIN	46254	44911	46877	28
PACIFIC	52262	45551	52262	65
CANADA	21000	12500	50000	17
SIZE OF STORE (IN SQUARE FEET)				
UNDER 20,000	12500	10000	15000	10
20,000 - 29,999	29000	29000	29000	122
30,000 - 39,999	33000	30635	33000	61
40,000 - 49,999	45551	45000	48000	80
50,000 - 59,999	52262	52262	52885	83
60,000 AND OVER	65000	61000	65884	27
TYPE OF STORE				
CONVENTIONAL	29000	29000	29000	156
SUPER STORE	45551	36751	50000	89
COMBINATION STORE	60860	48048	61374	25
WAREHOUSE	54000	26600	55408	21
OTHER				0
LOCATION OF STORE				
COMMUNITY/REGIONAL	48000	43000	58000	19
NEIGHBORHOOD	45551	36751	54000	114
FREE STANDING	23800	15165	44600	16
OTHER	33000	30000	52000	5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 25
MEDIAN SQUARE FEET OF SELLING AREA FOR NEW STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	30000	21200	39196	347
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION				0
10 - 30 MILLION				1
31 - 100 MILLION	17150	13750	22650	4
101 - 250 MILLION				3
251 - 500 MILLION	25000	11760	37400	11
OVER 500 MILLION	29000	21200	36600	286
GEOGRAPHIC REGION				
NEW ENGLAND	33600	33600	50000	19
MIDDLE ATLANTIC	30000	26626	35682	17
EAST NORTH CENTRAL	39664	39664	39664	30
WEST NORTH CENTRAL	40000	40000	40000	5
SOUTHEAST	21200	21200	23600	155
WEST SOUTH CENTRAL	39301	36000	42602	12
MOUNTAIN	33765	30539	35883	28
PACIFIC	39196	33788	39196	65
CANADA	17000	9500	40000	16
SIZE OF STORE (IN SQUARE FEET)				
UNDER 30,000	21200	21200	21200	131
30,000-39,999	29000	29000	29000	38
40,000-49,999	33600	30757	33765	68

Continued

TABLE 25

MEDIAN SQUARE FEET OF SELLING AREA FOR NEW STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
50,000 AND OVER	39664	39196	43200	110
TYPE OF STORE				
CONVENTIONAL	21200	21200	21200	155
SUPER STORE	33600	30539	40000	66
COMBINATION STORE	42962	42602	45000	13
WAREHOUSE	40000	19000	47096	21
OTHER				0
LOCATION OF STORE				
COMMUNITY/REGIONAL	33600	33600	43500	19
NEIGHBORHOOD	38000	30539	44685	79
FREE STANDING	19000	14500	36600	15
OTHER	20500	18600	31000	5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT; 1993

TABLE 26
MEDIAN COST FOR STORE EQUIPMENT, FIXTURES AND DECORATIONS PER SQUARE FOOT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$35.00	$30.61	$42.65	120
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION				0
10 - 30 MILLION				0
31 - 100 MILLION	52.00	35.00	70.00	4
101 - 250 MILLION				2
251 - 500 MILLION	40.25	40.00	43.67	11
OVER 500 MILLION	35.00	30.61	42.29	103
GEOGRAPHIC REGION				
NEW ENGLAND	43.00	43.00	43.00	10
MIDDLE ATLANTIC	48.00	38.00	55.00	10
EAST NORTH CENTRAL	40.00	33.00	42.00	7
WEST NORTH CENTRAL	25.00	25.00	25.00	5
SOUTHEAST	35.00	31.00	37.00	15
WEST SOUTH CENTRAL	32.50	27.51	42.29	12
MOUNTAIN	32.59	30.80	32.59	16
PACIFIC	30.61	30.61	37.59	28
CANADA	40.29	39.50	47.88	17
SIZE OF STORE (IN SQUARE FEET)				
UNDER 30,000	39.90	38.00	48.69	20
30,000-39,999	36.50	31.00	48.50	8

Continued

TABLE 26
MEDIAN COST FOR STORE EQUIPMENT, FIXTURES AND DECORATIONS PER SQUARE FOOT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
40,000-49,999	32.59	30.61	37.59	40
50,000 AND OVER	35.00	27.51	43.00	52
TYPE OF STORE				
CONVENTIONAL	39.00	34.30	53.72	16
SUPER STORE	36.00	31.00	43.00	57
COMBINATION STORE	27.51	27.51	27.59	13
WAREHOUSE	30.50	25.00	39.50	19
OTHER				0
LOCATION OF STORE				
COMMUNITY/REGIONAL	47.94	43.67	53.72	10
NEIGHBORHOOD	32.59	30.50	38.00	78
FREE STANDING	40.29	39.50	53.72	15
OTHER	40.00	35.00	40.00	5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 27
MEDIAN BUILDING COST PER SQUARE FOOT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$39.00	$33.00	$45.11	119
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION				0
10 - 30 MILLION				0
31 - 100 MILLION				3

Continued

TABLE 27
MEDIAN BUILDING COST PER SQUARE FOOT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
101 - 250 MILLION				2
251 - 500 MILLION	40.00	38.36	47.00	11
OVER 500 MILLION	37.27	33.00	45.11	103
GEOGRAPHIC REGION				
NEW ENGLAND	45.00	45.00	45.00	10
MIDDLE ATLANTIC	40.00	37.00	50.00	10
EAST NORTH CENTRAL	40.00	40.00	44.00	6
WEST NORTH CENTRAL	30.00	30.00	30.00	5
SOUTHEAST	33.00	32.00	34.00	15
WEST SOUTH CENTRAL	36.72	36.72	55.38	12
MOUNTAIN	37.27	31.91	37.27	16
PACIFIC	40.43	36.72	45.11	28
CANADA	47.40	39.50	55.30	17
SIZE OF STORE (IN SQUARE FEET)				
UNDER 30,000	39.00	34.00	55.30	19
30,000-39,999	36.00	32.00	42.00	8
40,000-49,999	40.43	37.27	42.77	40
50,000 AND OVER	36.72	31.91	45.00	52
TYPE OF STORE				
CONVENTIONAL	39.50	37.00	47.40	15
SUPER STORE	40.43	37.27	45.00	57
COMBINATION STORE	36.72	31.82	36.72	13
WAREHOUSE	33.00	30.00	33.18	19
OTHER				0
LOCATION OF STORE				
COMMUNITY/REGIONAL	47.00	39.00	51.35	10
NEIGHBORHOOD	37.27	32.00	40.43	77
FREE STANDING	55.30	34.00	63.00	15
OTHER	40.00	38.00	40.00	5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 28

MEDIAN TOTAL CONSTRUCTION COST PER SQUARE FOOT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$71.04	$64.23	$88.00	119
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION				0
10 - 30 MILLION				0
31 - 100 MILLION				3
101 - 250 MILLION				2
251 - 500 MILLION	82.00	78.61	90.85	11
OVER 500 MILLION	71.04	63.00	88.00	103
GEOGRAPHIC REGION				
NEW ENGLAND	88.00	88.00	88.00	10
MIDDLE ATLANTIC	87.83	75.00	98.00	10
EAST NORTH CENTRAL	80.00	77.00	82.00	6
WEST NORTH CENTRAL	55.00	55.00	55.00	5
SOUTHEAST	63.00	60.42	71.00	15
WEST SOUTH CENTRAL	64.23	64.23	97.67	12
MOUNTAIN	69.86	63.20	69.86	16
PACIFIC	71.04	71.04	82.70	28
CANADA	92.83	72.68	99.23	17
SIZE OF STORE (IN SQUARE FEET)				
UNDER 30,000	75.00	72.68	95.59	19
30,000-39,999	73.74	63.00	81.00	8
40,000-49,999	71.04	69.86	80.65	40
50,000 AND OVER	67.50	58.50	88.00	52
TYPE OF STORE				
CONVENTIONAL	75.00	71.00	90.85	15
SUPER STORE	72.00	69.86	88.00	57
COMBINATION STORE	60.42	59.41	64.23	13
WAREHOUSE	60.50	55.00	72.68	19
OTHER				0

Continued

TABLE 28
MEDIAN TOTAL CONSTRUCTION COST PER SQUARE FOOT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
LOCATION OF STORE				
COMMUNITY/REGIONAL	91.83	77.00	99.23	10
NEIGHBORHOOD	69.86	60.50	73.00	77
FREE STANDING	95.59	72.68	116.92	15
OTHER	80.00	69.00	82.00	5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 29
MEDIAN COST FOR OPENING INVENTORY

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$840000	$515000	$1000000	101
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION				0
10 - 30 MILLION				1
31 - 100 MILLION	367500	225000	500000	4
101 - 250 MILLION				3
251 - 500 MILLION	350000	225000	375000	5
OVER 500 MILLION	840000	638264	1000000	88
GEOGRAPHIC REGION				
NEW ENGLAND				1
MIDDLE ATLANTIC	605027	365685	1500000	7
EAST NORTH CENTRAL	412500	350000	485000	6
WEST NORTH CENTRAL	1000000	1000000	1000000	5
SOUTHEAST	600000	325000	1089300	12
WEST SOUTH CENTRAL	1680000	800000	1680000	8

Continued

TABLE 29
MEDIAN COST FOR OPENING INVENTORY

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
MOUNTAIN	840000	840000	900000	16
PACIFIC	835000	835000	1000000	30
CANADA	422650	316000	671500	16
SIZE OF STORE (IN SQUARE FEET)				
UNDER 30,000	365685	250000	395000	18
30,000-39,999	375000	325000	515000	9
40,000-49,999	837500	835000	840000	34
50,000 AND OVER	1000000	900000	1199000	40
TYPE OF STORE				
CONVENTIONAL	316000	225000	365685	14
SUPER STORE	835000	835000	1000000	43
COMBINATION STORE	1470000	900000	1680000	12
WAREHOUSE	940000	450300	1000000	21
OTHER				0
LOCATION OF STORE				
COMMUNITY/REGIONAL	1000000	515000	1066500	9
NEIGHBORHOOD	840000	671500	1000000	65
FREE STANDING	422650	316000	600000	14
OTHER	375000	350000	450000	5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 30-1

PERCENTAGE OF STORES ADDING THE FOLLOWING FEATURES IN NEW STORES IN 1992

		GEOGRAPHIC REGION								
	TOTAL	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL STORES	291	19	10	7	5	187	6	16	24	17
GREETING CARDS	75.6%	52.6%	80.0%	28.6%	100.0%	80.7%	100.0%	43.8%	95.8%	47.1%
WINE	60.1	-	-	42.9	-	72.2	83.3	43.8	79.2	35.3
SERVICE BAKERY/DELI	59.1	52.6	80.0	42.9	100.0	58.3	83.3	43.8	70.8	47.1
SCRATCH/BAKE-OFF BAKERY	58.4	52.6	80.0	28.6	-	56.1	100.0	43.8	91.7	58.8
PREPARED FOODS	50.5	52.6	80.0	42.9	-	57.2	16.7	31.3	20.8	47.1
SERVICE SEAFOOD	22.7	52.6	60.0	42.9	100.0	3.2	100.0	43.8	66.7	41.2
FLORAL/PLANT SHOP	22.7	52.6	70.0	42.9	-	5.9	100.0	37.5	66.7	41.2
VIDEO RENTALS	18.6	52.6	70.0	14.3	-	4.3	83.3	43.8	54.2	17.6
PHOTO CENTERS	15.5	47.4	40.0	14.3	-	1.6	83.3	25.0	62.5	23.5
PHARMACY	14.8	47.4	20.0	14.3	-	3.7	83.3	25.0	45.8	23.5

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

FACTS ABOUT NEW STORE DEVELOPMENT

TABLE 30-2

PERCENTAGE OF STORES ADDING THE FOLLOWING FEATURES IN NEW STORES IN 1992

		TYPE OF STORE					LOCATION OF STORE			
	TOTAL	CONVEN-TIONAL	SUPER STORE	COMBI-NATION	WARE-HOUSE	OTHER	COMMUNI. REGIONAL	NEIGH. CENTER	FREE STANDING	OTHER
TOTAL STORES	291	156	89	25	21	0	19	109	16	5
GREETING CARDS	75.6%	94.9%	49.4%	48.0%	76.2%		36.8%	56.9%	56.3%	-
WINE	60.1	87.8	22.5	44.0	33.3		15.8	27.5	56.3	-
SERVICE BAKERY/DELI	59.1	67.9	49.4	48.0	47.6		31.6	52.3	56.3	-
SCRATCH/BAKE-OFF BAKERY	58.4	68.6	46.1	44.0	52.4		42.1	47.7	62.5	-
PREPARED FOODS	50.5	70.5	36.0	12.0	9.5		42.1	28.4	50.0	-
SERVICE SEAFOOD	22.7	3.8	46.1	48.0	33.3		36.8	45.9	43.8	-
FLORAL/PLANT SHOP	22.7	5.8	49.4	48.0	4.8		42.1	44.0	50.0	-
VIDEO RENTALS	18.6	1.9	42.7	44.0	9.5		31.6	40.4	12.5	-
PHOTO CENTERS	15.5	-	39.3	40.0	-		15.8	35.8	18.8	-
PHARMACY	14.8	.6	33.7	48.0	-		21.1	30.3	25.0	-

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 31-1
MEAN RENT FOR NEW STORES

		GEOGRAPHIC REGION								
	TOTAL	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANAD
TOTAL	40	1	3	8	2	3	3	3	6	11
MINIMUM RENT	$7.45			$7.75					$7.68	$7.42
TOTAL	39	1	2	8	2	2	7	3	5	9
OVERAGES AS A PERCENT OF SALES	.7%			.8%			.3%		.4%	1.0%
TOTAL	39	1	3	8	2	2	3	3	6	11
EXPECTED TOTAL RENT	$7.65			$7.75					$7.68	$8.07

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 31-2
MEAN RENT FOR NEW STORES

		TYPE OF STORE					L			
	TOTAL	CONVEN-TIONAL	SUPER STORE	COMBI-NATION	WARE-HOUSE	OTHER	COMMUN. REGIONAL	NEIGH. CENTER	FREE STANDING	OTHER
TOTAL	40	8	15	4	10	0	6	23	7	4
MINIMUM RENT	$7.45	$5.53	$8.24	$6.19	$8.57		$8.19	$7.80	$6.06	$6.76
TOTAL	39	6	13	7	10	0	6	19	10	4
OVERAGES AS A PERCENT OF SALES	.7%	.9%	.9%	.4%	.4%		.9%	.7%	.3%	1.0%
TOTAL	39	7	15	4	10	0	6	23	6	4
EXPECTED TOTAL RENT	$7.65	$5.82	$8.40	$4.69	$8.57		$9.08	$7.70	$6.63	$6.76

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 32-1
MEAN RENT FOR EXISTING STORES

		GEOGRAPHIC REGION								
	TOTAL	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	348	13	36	68	7	50	4	24	60	86
MINIMUM RENT	$5.28	$5.27	$4.62	$4.92	$6.11	$4.60	$8.23	$5.58	$7.04	$4.74
TOTAL	305	13	36	59	9	44	4	26	54	60
OVERAGES AS A PERCENT OF SALES	.9%	.5%	.4%	.8%	.3%	1.0%	.3%	1.2%	1.3%	1.1%
TOTAL	257	13	32	39	3	20	0	22	50	78
EXPECTED TOTAL RENT	$7.53	$7.81	$5.46	$5.30		$4.53		$12.35	$7.63	$8.89

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 32-2
MEAN RENT FOR EXISTING STORES

		TYPE OF STORE					LOCATION OF STORE			
	TOTAL	CONVEN-TIONAL	SUPER STORE	COMBI-NATION	WARE-HOUSE	OTHER	COMMUN. REGIONAL	NEIGH. CENTER	FREE STANDING	OTHER
TOTAL	348	186	116	16	25	2	54	182	91	6
MINIMUM RENT	$5.28	$4.35	$6.29	$6.60	$6.66		$5.31	$5.34	$4.85	$7.01
TOTAL	305	146	117	14	23	2	46	162	79	3
OVERAGES AS A PERCENT OF SALES	.9%	.9%	1.0%	.9%	1.1%		1.1%	1.0%	.6%	
TOTAL	257	142	83	9	20	0	48	130	67	4
EXPECTED TOTAL RENT	$7.53	$6.89	$9.03	$6.97	$6.47		$10.31	$6.96	$6.98	$6.74

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 33
OWNERSHIP/LEASE ARRANGEMENT FOR NEW STORES

Explanation

To best describe the annual leasing arrangements for stores, the table lists information for each supermarket individually. It shows size, location, and type of supermarket, along with the rent paid and services provided by the landlord. All supermarkets are classified first by region then by size. To illustrate, in New England, the first region shown, each line represents a supermarket. The first line describes a 65,000 square foot super store. The company pays $15.00/square foot for rent plus 0.00% percent of sales as overages. The averages for rent, overages, annual common-area charges, total rent and size for all stores in that region appear at the end of that region's listing.

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
NEW ENGLAND	COMM./REGIONAL	SUPER STORE	$15.00	0.00%	$17.25	X	X			X	X	X	X			65,000
AVERAGE			$15.00	0.00%	$17.25											65,000
MID-ATLANTIC	NEIGHBORHOOD	SUPER STORE	$7.75	1.25%	$7.75	X				X	X		X			37,500
	NEIGHBORHOOD	SUPER STORE	$9.00		$9.00	X				X	X		X		$200	36,200
	NEIGHBORHOOD	CONVENTIONAL	$7.83	0.00%	$7.83	X				X	X		X			34,075
AVERAGE			$8.19	0.62%	$8.19										$200	35,925
E N CENTRAL	BUSINESS DIST.	SUPER STORE	$8.00	1.00%	$8.00	X					X		X			52,000
	FREE STANDING	WAREHOUSE	$11.85	0.00%	$11.85	X				X	X		X			51,926
	NEIGHBORHOOD	WAREHOUSE	$8.60	0.00%	$8.60	X				X	X		X			45,680
	COMM./REGIONAL	SUPER STORE	$8.50	1.00%	$8.50	X				X	X					36,000
	BUSINESS DIST.	SUPER STORE	$6.40	1.00%	$6.40	X					X		X			33,000
	BUSINESS DIST.	CONVENTIONAL	$6.40	1.00%	$6.40	X					X		X			30,000
	NEIGHBORHOOD	CONVENTIONAL	$6.00	1.00%	$6.00	X				X	X					28,000
	BUSINESS DIST.	CONVENTIONAL	$6.25	1.00%	$6.25	X					X		X			18,600
AVERAGE			$7.75	0.75%	$7.75											36,901
W N CENTRAL	NEIGHBORHOOD	COMBINATION	$7.50	0.00%	$7.50	X				X	X		X			67,000
	NEIGHBORHOOD	COMBINATION	$7.75	1.00%	$7.75	X				X	X		X			65,000
AVERAGE			$7.62	0.50%	$7.62											66,000

TABLE 33

OWNERSHIP/LEASE ARRANGEMENT FOR NEW STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
SOUTHEAST	NEIGHBORHOOD	CONVENTIONAL	$7.75	1.00%	$8.10	X					X	X		X		31,089
	NEIGHBORHOOD	SUPER STORE	$6.25	1.00%	$6.50	X					X	X		X	$18,000	31,000
	FREE STANDING	CONVENTIONAL	$3.86							X	X					17,829
AVERAGE			$5.95	1.00%	$7.30										$18,000	26,639
W S CENTRAL	FREE STANDING	COMBINATION		0.00%												92,700
	FREE STANDING	COMBINATION	$3.50	1.00%	$3.50										$0	85,000
	FREE STANDING	WAREHOUSE	$8.05	1.00%	$8.05	X					X	X				60,878
	FREE STANDING	COMBINATION		0.00%												46,900
	FREE STANDING	COMBINATION		0.00%												46,900
	FREE STANDING	SUPER STORE		0.00%												41,800
	FREE STANDING	SUPER STORE	$2.86	0.00%	$2.86										$0	40,800
AVERAGE			$4.80	0.28%	$4.80										$0	59,283
MOUNTAIN	NEIGHBORHOOD	COMBINATION	$6.00	1.00%	$0.00	X										62,000
	NEIGHBORHOOD	WAREHOUSE	$7.33	1.00%	$7.33	X					X	X				51,800
	NEIGHBORHOOD	SUPER STORE	$8.00	1.25%	$8.00	X					X	X				42,000
AVERAGE			$7.11	1.08%	$5.11											51,933
PACIFIC	NEIGHBORHOOD	WAREHOUSE	$9.73	0.50%	$9.73	X					X	X				50,052
	NEIGHBORHOOD	WAREHOUSE	$8.55	0.00%	$8.55	X					X	X				49,950
	NEIGHBORHOOD	WAREHOUSE	$9.26	0.00%	$9.26	X					X	X				48,600
	NEIGHBORHOOD	SUPER STORE	$7.00	1.50%	$7.00	X	X				X	X			$100,000	44,000
	FREE STANDING	WAREHOUSE	$8.56	0.00%	$8.56	X					X	X		X		40,900
	NEIGHBORHOOD	CONVENTIONAL	$3.00		$3.00			X	X	X					$0	15,000

TABLE 33
OWNERSHIP/LEASE ARRANGEMENT FOR NEW STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD --									ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
						--INSTALLATION OF HEATING/AIR CONDITIONING	--MAINTENANCE OF HEATING/AIR CONDITIONING	--TAXES	--INCREASES IN TAXES	--INSURANCE	--PARKING INSTALLATION	--SPRINKLER SYSTEM	--SECURITY	--SNOW REMOVAL		
						V	V	V	V	V	V	V	V	V		
AVERAGE			$7.68	0.40%	$7.68										$50,000	41,417
WEST	COMM./REGIONAL	SUPER STORE	$9.88	1.00%	$9.88	X					X	X		X		75,000
	NEIGHBORHOOD	SUPER STORE	$10.27	1.00%	$10.27	X					X	X		X		40,000
AVERAGE			$10.08	1.00%	$10.08											57,500
ONTARIO	NEIGHBORHOOD	SUPER STORE	$9.88		$9.88			X	X	X	X	X	X	X		43,462
	NEIGHBORHOOD	SUPER STORE	$8.77		$8.69			X	X	X	X	X	X	X		32,500
AVERAGE			$9.33		$9.29											37,981
QUEBEC	COMM./REGIONAL	SUPER STORE	$6.01	1.50%	$6.01	X					X					42,169
	NEIGHBORHOOD	WAREHOUSE	$6.87	1.50%	$6.87	X					X					29,516
	COMM./REGIONAL	CONVENTIONAL	$3.19	1.50%	$3.19	X					X					26,448
	NEIGHBORHOOD	WAREHOUSE	$6.94	0.00%	$6.94	X					X				$50,949	25,240
	COMM./REGIONAL		$6.56	0.65%	$9.66						X				$13,418	20,100
	NEIGHBORHOOD		$9.48	0.75%	$12.45	X	X				X				$14,728	18,600
	FREE STANDING		$3.75	0.67%	$4.98	X	X				X				$6,320	8,000
AVERAGE			$6.11	0.93%	$7.16										$21,354	24,296
AVERAGE FOR ALL REGIONS			$7.45	0.66%	$7.65										$20,362	42,278

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

TABLE 34
OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

Explanation

To best describe the actual leasing arrangements for stores, the table lists information for each supermarket individually. It shows size, location, and type of supermarket, along with the rent paid and services provided by the landlord. All supermarkets are classified first by region then by size. To illustrate, in New England, the first region shown, each line represents a supermarket. The first line describes a 60,000 square foot super store. The company pays $12.00/square foot for rent plus 0.10% percent of sales as overages. The averages for rent, overages, annual common-area charges, total rent and size for all stores in that region appear at the end of that region's listing.

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
NEW ENGLAND	NEIGHBORHOOD	SUPER STORE	$12.00	0.10%	$14.30	X	X				X	X	X	X		60,000
	NEIGHBORHOOD	CONVENTIONAL	$5.00	1.25%	$8.28	X									$18,000	32,000
	NEIGHBORHOOD	CONVENTIONAL	$4.50	0.00%	$8.55	X					X			X	$55,000	29,344
	NEIGHBORHOOD	CONVENTIONAL	$4.42	0.50%	$7.55	X									$13,000	26,201
	NEIGHBORHOOD	CONVENTIONAL	$5.50	0.80%	$9.70	X	X				X	X	X	X		25,000
	FREE STANDING	CONVENTIONAL	$3.96	1.25%	$6.61	X									$0	24,049
	NEIGHBORHOOD	CONVENTIONAL	$4.40	0.40%	$7.50			X	X	X						24,000
	COMM./REGIONAL	CONVENTIONAL	$5.00	1.50%	$12.50	X		X	X		X	X			$12,000	18,000
	FREE STANDING	CONVENTIONAL	$3.21	0.00%	$3.21	X		X	X						$0	15,495
	NEIGHBORHOOD	CONVENTIONAL	$7.75	0.00%	$8.70	X		X			X			X		14,440
	FREE STANDING	CONVENTIONAL	$1.78	0.00%	$2.64	X									$0	13,297
	FREE STANDING	CONVENTIONAL	$2.09	1.25%	$3.17	X				X					$0	12,641
	FREE STANDING	CONVENTIONAL	$8.85	0.00%	$8.85											12,000
AVERAGE			$5.27	0.54%	$7.81										$12,250	23,574
MID-ATLANTIC	COMM./REGIONAL	SUPER STORE	$12.00	1.00%	$13.50	X		X	X		X	X				58,000
	NEIGHBORHOOD	SUPER STORE	$2.36	0.00%	$2.36											53,056
	COMM./REGIONAL	SUPER STORE	$7.50	1.00%	$7.50											52,059
	COMM./REGIONAL	SUPER STORE	$6.22	1.00%	$6.22											49,400
	NEIGHBORHOOD	SUPER STORE	$10.50	1.25%	$10.50	X					X	X		X	$250	43,700
	NEIGHBORHOOD	SUPER STORE	$7.25	0.33%	$8.52										$21,000	42,000
	NEIGHBORHOOD	SUPER STORE	$9.25	1.25%	$10.00	X					X	X		X	$200	40,800
	FREE STANDING	WAREHOUSE	$9.50	0.00%	$9.50	X					X	X			$0	39,708
	COMM./REGIONAL	SUPER STORE	$7.29	0.29%	$8.06										$0	37,250
	NEIGHBORHOOD	SUPER STORE	$8.00	1.50%	$10.00	X					X	X		X	$200	37,200
	COMM./REGIONAL	SUPER STORE	$7.43	0.19%	$8.16										$0	37,150
	FREE STANDING	SUPER STORE	$2.36	0.06%	$2.59			X		X					$0	33,000
	COMM./REGIONAL	SUPER STORE	$5.00	0.00%	$5.00						X			X	$40,000	32,500

TABLE 34

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

						SERVICES PROVIDED BY THE LANDLORD --										
						--INSTALLATION OF HEATING/AIR CONDITIONING										
							--MAINTENANCE OF HEATING/AIR CONDITIONING									
								--TAXES								
									--INCREASES IN TAXES							
										--INSURANCE						
											--PARKING INSTALLATION					
												--SPRINKLER SYSTEM				
													--SECURITY			
														--SNOW REMOVAL		
REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	V	V	V	V	V	V	V	V	V	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
	NEIGHBORHOOD	SUPER STORE	$3.40	0.26%	$4.70										$0	31,785
	FREE STANDING	CONVENTIONAL	$1.73	0.00%	$1.73											31,428
	FREE STANDING	CONVENTIONAL	$0.81	0.32%	$2.27										$0	29,760
	FREE STANDING	CONVENTIONAL	$4.50	0.24%	$5.04										$0	26,000
	NEIGHBORHOOD	CONVENTIONAL	$2.96	0.40%	$4.33										$3,480	25,102
	NEIGHBORHOOD	CONVENTIONAL	$3.50	0.03%	$4.25						X			X	$27,000	25,000
	FREE STANDING	CONVENTIONAL	$0.73	0.17%	$1.22					X					$0	24,600
	NEIGHBORHOOD	CONVENTIONAL	$3.00	1.00%	$4.25	X					X				$10,000	24,365
	FREE STANDING	CONVENTIONAL	$0.75	0.12%	$1.24										$0	23,960
	NEIGHBORHOOD	CONVENTIONAL	$2.97	0.42%	$4.14										$0	23,572
	FREE STANDING	CONVENTIONAL	$0.60	0.09%	$1.02										$0	22,700
	NEIGHBORHOOD	CONVENTIONAL	$6.50	0.00%	$6.50	X					X	X		X		22,210
	NEIGHBORHOOD	CONVENTIONAL	$3.50	0.00%							X				$10,000	18,000
	FREE STANDING	CONVENTIONAL	$6.50	0.00%				X	X	X	X				$0	18,000
	FREE STANDING	CONVENTIONAL	$2.54	0.79%	$7.06			X		X					$0	17,227
	FREE STANDING	CONVENTIONAL	$1.70	0.71%	$4.55										$0	16,919
	NEIGHBORHOOD	CONVENTIONAL	$4.50	0.00%				X	X	X	X				$0	16,500
	FREE STANDING	CONVENTIONAL	$2.60	0.17%	$3.27										$0	16,376
	FREE STANDING	CONVENTIONAL	$3.33	0.11%	$3.67										$0	15,054
	NEIGHBORHOOD	CONVENTIONAL	$4.01	0.17%	$4.73					X					$0	14,998
	FREE STANDING	CONVENTIONAL	$5.94	0.00%	$5.94											14,300
	FREE STANDING	CONVENTIONAL	$2.50	0.00%				X		X	X				$0	11,500
	FREE STANDING	CONVENTIONAL	$3.00	0.00%	$3.00						X			X	$15,000	10,000
AVERAGE			$4.62	0.35%	$5.46										$4,384	28,755
E N CENTRAL	NEIGHBORHOOD	SUPER STORE	$5.35			X		X	X	X	X	X		X		72,000
	COMM./REGIONAL	SUPER STORE	$2.50	0.50%	$4.00											72,000
	COMM./REGIONAL	SUPER STORE	$7.00	1.00%		X		X	X	X	X	X		X		53,000
	NEIGHBORHOOD	SUPER STORE	$6.75	1.25%	$6.75					X	X	X		X	$48,000	51,000
	NEIGHBORHOOD	SUPER STORE	$0.00	1.50%	$0.00						X			X	$17,952	48,752

TABLE 34

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

						SERVICES PROVIDED BY THE LANDLORD --										
						--INSTALLATION OF HEATING/AIR CONDITIONING										
							--MAINTENANCE OF HEATING/AIR CONDITIONING									
								--TAXES								
									--INCREASES IN TAXES							
										--INSURANCE						
											--PARKING INSTALLATION					
												--SPRINKLER SYSTEM				
													--SECURITY			
														--SNOW REMOVAL		
REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	V	V	V	V	V	V	V	V	V	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
	NEIGHBORHOOD	SUPER STORE		2.00%		X		X	X	X	X	X		X		47,000
	COMM./REGIONAL	SUPER STORE	$5.52	1.00%	$6.25	X					X	X			$18,000	45,600
	COMM./REGIONAL	SUPER STORE	$5.52	1.00%	$6.25	X					X	X			$18,000	45,600
	COMM./REGIONAL	SUPER STORE	$0.00	0.00%	$0.00											45,000
	NEIGHBORHOOD	SUPER STORE	$4.07	1.00%		X					X	X		X	$12,000	44,368
	COMM./REGIONAL	COMBINATION	$6.00	1.25%	$7.25	X					X	X		X		43,000
	FREE STANDING	COMBINATION	$6.60	1.00%	$8.60	X					X	X				43,000
	FREE STANDING	COMBINATION	36.00	1.25%	$7.25	X					X	X				43,000
			$4.14	0.75%	$6.07											42,800
	NEIGHBORHOOD	SUPER STORE	$7.25	0.00%	$7.25					X	X	X		X	$24,000	42,000
			$5.50	0.50%	$5.50											42,000
			$4.20	1.50%	$4.70					X	X		X	X	$37,000	41,822
	NEIGHBORHOOD	SUPER STORE		2.00%		X		X	X	X	X	X		X		40,000
	FREE STANDING	WAREHOUSE	$4.80	0.85%	$4.80	X		X	X	X	X	X	X	X	$16,884	40,000
	FREE STANDING	WAREHOUSE	$6.73	1.00%		X					X	X				39,000
	NEIGHBORHOOD	SUPER STORE	$6.50	1.00%		X						X				38,000
	NEIGHBORHOOD	SUPER STORE	$4.80	1.00%		X					X	X				36,446
	NEIGHBORHOOD	SUPER STORE	$4.85	1.00%		X					X	X				36,274
	NEIGHBORHOOD	SUPER STORE	$5.21	1.00%		X					X	X				36,160
	NEIGHBORHOOD	SUPER STORE	$4.36	1.00%		X					X	X		X		36,160
	NEIGHBORHOOD	SUPER STORE	$2.11	1.10%	$2.88	X		X	X	X	X			X	$12,285	36,000
	NEIGHBORHOOD	SUPER STORE	$9.00	1.00%	$9.00	X					X	X				36,000
	NEIGHBORHOOD	SUPER STORE	$3.16	1.00%		X					X	X				35,681
	FREE STANDING	WAREHOUSE	$5.91	0.00%	$5.91	X		X		X	X	X			$0	35,500
	NEIGHBORHOOD	SUPER STORE	$5.49	1.00%		X					X	X		X	$8,500	33,668
	NEIGHBORHOOD	SUPER STORE	$4.73	1.00%		X					X	X		X	$3,000	32,200
	NEIGHBORHOOD	SUPER STORE	$3.88	1.00%		X					X	X		X	$93,000	32,060
	NEIGHBORHOOD	SUPER STORE		2.00%		X		X	X	X	X	X		X		32,000
	NEIGHBORHOOD	SUPER STORE	$5.00	1.00%	$5.00	X					X	X				31,500
	NEIGHBORHOOD	SUPER STORE	$3.24	1.00%		X					X	X				31,500
	NEIGHBORHOOD	SUPER STORE	$5.90	1.00%		X					X	X		X	$10,000	31,200
	NEIGHBORHOOD	SUPER STORE	$5.33	1.00%		X					X	X		X	$6,000	31,100

TABLE 34

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
	NEIGHBORHOOD	CONVENTIONAL	$5.80				X	X				X		$15,000	31,000
	NEIGHBORHOOD	CONVENTIONAL	$3.16	0.75%			X	X				X		$25,000	31,000
	FREE STANDING	SUPER STORE	$3.40	1.00%		X			X	X					30,889
	COMM./REGIONAL	SUPER STORE	$3.95	1.00%		X			X	X					30,000
	NEIGHBORHOOD	CONVENTIONAL	$4.86		$4.86	X			X						30,000
	NEIGHBORHOOD	CONVENTIONAL	$4.45		$4.45	X			X						29,800
	FREE STANDING	CONVENTIONAL	$5.41	1.00%		X			X	X					28,890
	FREE STANDING	CONVENTIONAL	$3.49	1.00%		X			X	X					28,830
	FREE STANDING	CONVENTIONAL	$7.75		$7.75	X		X	X	X	X			$0	28,000
	NEIGHBORHOOD	CONVENTIONAL	$6.00	1.00%		X			X	X		X			28,000
	NEIGHBORHOOD	CONVENTIONAL	$5.00	1.00%	$6.12	X			X	X					25,000
	NEIGHBORHOOD	CONVENTIONAL	$5.69	1.00%		X			X	X					24,400
	FREE STANDING	CONVENTIONAL	$5.75	1.00%	$5.75	X			X	X					24,000
	COMM./REGIONAL	CONVENTIONAL	$6.00	0.00%	$6.00										24,000
	FREE STANDING	CONVENTIONAL	$3.85	1.00%		X	X	X	X	X					23,000
	NEIGHBORHOOD	CONVENTIONAL	$3.91		$3.91	X			X						23,000
	NEIGHBORHOOD	CONVENTIONAL	$6.83		$6.83	X			X						23,000
	BUSINESS DIST.	CONVENTIONAL	$3.73			X			X	X					22,000
	FREE STANDING	CONVENTIONAL	$3.55	1.25%	$4.10	X			X	X					22,000
	NEIGHBORHOOD	CONVENTIONAL	$6.25	0.00%	$6.25			X	X			X		$7,590	21,700
	NEIGHBORHOOD	CONVENTIONAL	$2.75	1.00%	$3.00	X	X		X		X	X			21,250
	FREE STANDING	CONVENTIONAL	$4.00	0.00%		X			X	X					21,000
		CONVENTIONAL	$6.00	0.00%	$6.00				X	X					21,000
	FREE STANDING	CONVENTIONAL	$5.23	0.00%	$5.84	X		X	X	X				$0	19,500
	FREE STANDING	CONVENTIONAL	$4.42	0.00%		X			X	X					19,000
	NEIGHBORHOOD	CONVENTIONAL	$4.50	0.50%	$4.50			X	X			X		$2,500	18,500
	NEIGHBORHOOD	CONVENTIONAL	$4.57		$4.57	X			X						17,500
	FREE STANDING	CONVENTIONAL	$6.80	0.00%	$4.58	X		X	X	X				$0	15,000
	FREE STANDING	CONVENTIONAL	$4.38	0.00%	$4.38	X		X	X	X				$0	14,500
	FREE STANDING	CONVENTIONAL	$6.00	0.00%	$6.00				X	X	X		X	$0	7,000
	FREE STANDING	CONVENTIONAL	$6.00			X		X	X						6,000
	FREE STANDING	CONVENTIONAL	$6.51		$6.51	X			X						6,000

TABLE 34

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

						SERVICES PROVIDED BY THE LANDLORD --										
						--INSTALLATION OF HEATING/AIR CONDITIONING										
							--MAINTENANCE OF HEATING/AIR CONDITIONING									
								--TAXES								
									--INCREASES IN TAXES							
										--INSURANCE						
											--PARKING INSTALLATION					
												--SPRINKLER SYSTEM				
													--SECURITY			
														--SNOW REMOVAL		
REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	V	V	V	V	V	V	V	V	V	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
	NEIGHBORHOOD	WAREHOUSE	$3.50	1.00%	$4.25	X					X	X		X	$10,000	
	FREE STANDING	CONVENTIONAL	$3.50		$3.50	X					X					
AVERAGE			$4.92	0.84%	$5.30										$15,388	32,422
W N CENTRAL	FREE STANDING	SUPER STORE		0.00%		X					X	X		X		73,000
	FREE STANDING	SUPER STORE		0.00%		X					X	X		X		73,000
	NEIGHBORHOOD	COMBINATION	$6.00	1.00%	$9.00	X					X	X		X		73,000
	FREE STANDING	SUPER STORE		0.00%		X					X	X		X		60,000
	NEIGHBORHOOD	WAREHOUSE	$7.10	0.00%	$7.10	X					X	X		X		41,528
	FREE STANDING	COMBINATION	$4.42	0.00%		X					X	X				35,000
	FREE STANDING	COMBINATION	$3.25			X					X	X		X		35,000
	COMM./REGIONAL	CONVENTIONAL	$4.47	1.00%		X					X	X	X			28,000
	NEIGHBORHOOD	CONVENTIONAL	$13.33	0.00%	$0.00						X			X		21,000
	COMM./REGIONAL	CONVENTIONAL	$4.23	1.00%		X					X	X		X		17,000
AVERAGE			$6.11	0.33%	$5.37											45,653
SOUTHEAST	NEIGHBORHOOD	SUPER STORE	$3.00	0.00%	$3.00	X					X	X				70,000
	BUSINESS DIST.	WAREHOUSE	$8.49	0.00%	$8.49				X		X	X		X	$35,848	69,820
	COMM./REGIONAL	COMBINATION	$7.68	1.25%		X			X		X	X				65,537
	COMM./REGIONAL	SUPER STORE	$6.71	1.25%		X			X		X	X				55,000
	FREE STANDING	SUPER STORE	$9.60	0.00%			X									52,014
	FREE STANDING	SUPER STORE	$9.20	0.00%			X									52,014
	NEIGHBORHOOD	SUPER STORE	$7.58	1.25%		X			X		X	X				48,890
	NEIGHBORHOOD	SUPER STORE	$7.97	1.25%		X			X		X	X				47,814
	NEIGHBORHOOD	SUPER STORE	$6.27	1.00%		X			X		X	X				42,112
	NEIGHBORHOOD	SUPER STORE	$5.22	1.00%		X			X		X	X				39,795
	NEIGHBORHOOD	SUPER STORE	$3.58	1.00%		X			X		X	X				36,464
	NEIGHBORHOOD	SUPER STORE	$5.95	1.00%	$5.95	X					X	X				35,000

TABLE 34

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
	NEIGHBORHOOD	SUPER STORE	$3.50	1.00%	$3.72	X					X	X				35,000
	NEIGHBORHOOD	CONVENTIONAL														30,400
	NEIGHBORHOOD	CONVENTIONAL	$3.02							X	X					30,000
	NEIGHBORHOOD	SUPER STORE	$2.00	0.00%	$2.00	X					X	X				30,000
	NEIGHBORHOOD	CONVENTIONAL	$1.88	0.00%	$2.50			X	X		X				$0	30,000
	NEIGHBORHOOD	CONVENTIONAL	$5.50	1.00%	$6.00	X					X	X		X	$12,000	28,000
	NEIGHBORHOOD	CONVENTIONAL	$3.78	1.00%	$3.78			X		X	X				$3,900	26,000
	NEIGHBORHOOD	CONVENTIONAL	$2.00	0.00%	$2.00	X					X	X				26,000
	COMM./REGIONAL	CONVENTIONAL	$4.02	1.00%	$4.02					X	X				$4,359	21,796
	COMM./REGIONAL	CONVENTIONAL	$5.83	1.00%	$6.19					X	X				$3,750	21,780
	NEIGHBORHOOD	CONVENTIONAL	$3.25	1.00%	$3.40	X					X	X				21,000
	NEIGHBORHOOD	CONVENTIONAL	$1.94	1.00%		X				X	X	X				21,000
	NEIGHBORHOOD	CONVENTIONAL														19,865
	NEIGHBORHOOD	CONVENTIONAL	$4.55	1.00%	$4.55					X	X				$3,400	18,779
	NEIGHBORHOOD	CONVENTIONAL	$4.43	1.00%	$4.43			X		X	X				$3,400	18,779
	NEIGHBORHOOD	CONVENTIONAL	$6.25	1.25%	$6.25						X			X	$1,600	16,000
	NEIGHBORHOOD	CONVENTIONAL	$1.85	1.00%	$3.25						X				$3,000	15,600
	NEIGHBORHOOD	CONVENTIONAL	$2.92	1.00%	$2.92					X	X				$3,000	15,552
	FREE STANDING	CONVENTIONAL	$3.15					X		X	X					14,440
	NEIGHBORHOOD	CONVENTIONAL	$2.93							X	X					12,302
	FREE STANDING	CONVENTIONAL	$6.00	1.00%	$6.00			X		X	X					12,000
	FREE STANDING	CONVENTIONAL	$1.84													11,000
	FREE STANDING	CONVENTIONAL	$1.80	1.50%	$2.82					X	X					10,000
	NEIGHBORHOOD	CONVENTIONAL	$4.20			X		X	X		X					10,000
	FREE STANDING	CONVENTIONAL	$1.00					X		X	X					9,600
	BUSINESS DIST.	CONVENTIONAL	$9.27		$9.27	X	X				X		X	X	$18,400	9,200
	FREE STANDING	CONVENTIONAL		4.00%												8,000
	NEIGHBORHOOD	CONVENTIONAL	$4.06	1.00%												
	NEIGHBORHOOD	CONVENTIONAL	$3.50	0.00%												
	NEIGHBORHOOD	CONVENTIONAL	$6.00	0.00%												
	NEIGHBORHOOD	CONVENTIONAL	$2.00	0.00%												
	NEIGHBORHOOD	CONVENTIONAL	$4.42	1.00%												

TABLE 34

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- V	V	V	V	V	V	V	V	V	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
						--INSTALLATION OF HEATING/AIR CONDITIONING	--MAINTENANCE OF HEATING/AIR CONDITIONING	--TAXES	--INCREASES IN TAXES	--INSURANCE	--PARKING INSTALLATION	--SPRINKLER SYSTEM	--SECURITY	--SNOW REMOVAL		
	NEIGHBORHOOD	CONVENTIONAL	$3.34	1.00%												
	NEIGHBORHOOD	CONVENTIONAL	$5.50	1.00%												
	NEIGHBORHOOD	CONVENTIONAL	$5.00	1.00%												
	NEIGHBORHOOD	CONVENTIONAL	$3.60	1.25%												
	NEIGHBORHOOD	CONVENTIONAL	$3.25	1.00%												
	NEIGHBORHOOD	CONVENTIONAL	$5.00	2.00%												
	NEIGHBORHOOD	CONVENTIONAL	$5.00	2.00%												
	NEIGHBORHOOD	CONVENTIONAL	$5.00	2.00%												
	NEIGHBORHOOD	CONVENTIONAL	$6.00	1.00%												
AVERAGE			$4.60	0.95%	$4.53										$7,721	29,142
W S CENTRAL	FREE STANDING	COMBINATION	$9.60	00%				X								57,232
	FREE STANDING	COMBINATION	$11.08	1.25%				X								57,136
	FREE STANDING	SUPER STORE	$8.96	0.00%				X								47,504
	FREE STANDING	CONVENTIONAL	$3.29	0.00%				X		X					$1,000	17,000
AVERAGE			$8.23	0.31%											$1,000	44,718
MOUNTAIN	NEIGHBORHOOD	SUPER STORE	$4.60	1.00%	$24.00	X				X	X				$25,000	70,000
	FREE STANDING	SUPER STORE	$3.72	1.00%	$21.50	X				X	X					68,000
	EIGHBORHOOD	OTHER	$7.45	1.50%		X				X	X		X		$18,000	65,000
	NEIGHBORHOOD	SUPER STORE	$7.16	1.50%	$7.16				X	X		X	X		$57,000	61,046
	NEIGHBORHOOD	WAREHOUSE	$6.00	1.00%	$9.00	X				X	X		X			55,500
	NEIGHBORHOOD	COMBINATION	$5.00	1.00%	$5.00	X							X		$60,000	55,000
	FREE STANDING	SUPER STORE	$6.00	1.50%	$33.20	X				X	X					55,000
	NEIGHBORHOOD	OTHER	$5.75	1.00%		X				X	X		X		$14,000	52,000
	FREE STANDING	SUPER STORE	$3.33	1.75%	$7.68					X						49,100
	FREE STANDING	SUPER STORE	$8.11	0.00%				X								47,600
	NEIGHBORHOOD	SUPER STORE	$6.00	1.00%	$9.00	X				X	X		X			47,500

TABLE 34
OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
	NEIGHBORHOOD	SUPER STORE	$6.00	1.00%	$9.00	X				X	X		X			47,500
	FREE STANDING	COMBINATION	$2.05	1.00%	$4.00	X				X					$0	46,000
	NEIGHBORHOOD	SUPER STORE	$2.69	1.50%	$11.33				X	X		X	X		$65,000	45,950
	FREE STANDING	COMBINATION	$7.40	1.50%	$7.40	X				X						45,000
	NEIGHBORHOOD	SUPER STORE		1.50%	$5.00	X			X	X	X		X			45,000
	FREE STANDING	SUPER STORE	$9.92	0.00%			X									42,121
	FREE STANDING	SUPER STORE	$7.64	1.50%	$7.81					X						42,120
	NEIGHBORHOOD	SUPER STORE	$4.50	1.00%	$24.00	X				X	X				$8,000	41,000
	NEIGHBORHOOD	COMBINATION	$4.25	1.00%	$4.25	X							X		$26,000	40,000
	COMM./REGIONAL	COMBINATION	$9.00	1.00%	$10.00	X							X		$55,000	40,000
	FREE STANDING	SUPER STORE	$7.20	1.00%	$42.00	X				X	X					40,000
	NEIGHBORHOOD	SUPER STORE		1.50%	$5.00	X			X	X	X		X			36,000
	NEIGHBORHOOD	CONVENTIONAL	$8.07	1.75%	$12.36	X				X	X	X	X		$56,600	20,000
	NEIGHBORHOOD	CONVENTIONAL	$2.05	1.00%	$2.15	X				X					$3,600	20,000
	FREE STANDING	CONVENTIONAL	$0.00	2.25%	$10.87		X	X	X						$0	9,000
AVERAGE			$5.58	1.18%	$12.35										$29,862	45,594
PACIFIC	NEIGHBORHOOD	SUPER STORE	$12.00	1.50%	$12.00				X	X		X	X		$42,000	62,418
	NEIGHBORHOOD	SUPER STORE	$6.60	1.50%	$6.60					X		X	X		$33,000	61,046
	NEIGHBORHOOD	SUPER STORE	$11.76		$15.59	X				X					$36,000	60,114
	NEIGHBORHOOD	SUPER STORE	$7.50	1.50%	$7.60				X	X		X	X		$41,000	60,114
	NEIGHBORHOOD	SUPER STORE	$7.61	1.50%	$8.04				X	X		X	X		$36,000	60,106
	NEIGHBORHOOD	SUPER STORE	$8.50	1.50%	$8.50				X	X		X	X		$30,000	59,885
	NEIGHBORHOOD	SUPER STORE	$5.52	1.50%	$7.78			X	X	X		X	X		$26,000	59,231
	FREE STANDING	WAREHOUSE	$7.88	0.00%	$7.88	X				X	X					59,000
	NEIGHBORHOOD	SUPER STORE	$5.86	1.50%	$8.95				X	X		X	X		$45,000	56,477
	NEIGHBORHOOD	SUPER STORE	$4.45	1.50%	$7.75				X	X		X	X		$49,000	55,826
	NEIGHBORHOOD	SUPER STORE	$5.07	1.50%	$8.77				X	X		X	X		$52,000	54,415
	NEIGHBORHOOD	COMBINATION	$10.89	0.00%			X									52,570
	NEIGHBORHOOD	SUPER STORE	$4.00	1.50%	$10.30			X	X	X		X	X		$36,000	49,800

TABLE 34

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
	NEIGHBORHOOD	SUPER STORE	$3.58	1.50%	$7.00			X	X	X		X	X		$36,000	49,043
	NEIGHBORHOOD	SUPER STORE	$11.90	1.50%	$11.90	X	X			X	X				$40,000	49,000
	NEIGHBORHOOD	SUPER STORE	$12.36	1.50%	$12.36	X	X			X	X				$50,000	49,000
	FREE STANDING	SUPER STORE	$11.00	0.00%				X								47,600
	NEIGHBORHOOD	SUPER STORE	$10.81	0.00%	$10.81										$52,000	45,000
	NEIGHBORHOOD	SUPER STORE	$12.21	0.00%	$12.21										$50,000	45,000
	NEIGHBORHOOD	SUPER STORE	$11.97	0.00%	$11.97										$49,200	45,000
	NEIGHBORHOOD	WAREHOUSE	$8.62	1.00%	$8.62	X				X	X					44,400
		SUPER STORE	$8.25	2.50%									X			44,000
		WAREHOUSE	$8.00	2.10%									X			44,000
		WAREHOUSE	$8.25	2.00%									X			44,000
		WAREHOUSE	$8.00	2.22%									X			43,000
	FREE STANDING	WAREHOUSE	$7.40		$7.40					X	X		X		$9,984	40,000
	FREE STANDING	WAREHOUSE	$6.89		$7.40					X	X		X		$9,984	40,000
	NEIGHBORHOOD	SUPER STORE	$8.54	1.25%	$8.80										$42,700	39,680
	BUSINESS DIST.	SUPER STORE	$11.40	0.00%				X								39,371
	NEIGHBORHOOD	SUPER STORE	$10.25	1.25%	$13.60										$9,900	39,002
		WAREHOUSE	$8.25	2.50%									X			39,000
	NEIGHBORHOOD	WAREHOUSE	$6.25	1.50%	$7.25					X					$3,600	38,800
	NEIGHBORHOOD	SUPER STORE	$3.13	1.25%	$8.95										$20,900	38,735
	NEIGHBORHOOD	SUPER STORE	$3.48	0.00%	$3.48										$23,100	37,181
	NEIGHBORHOOD	SUPER STORE	$3.82	1.25%	$5.01										$65,100	36,929
	NEIGHBORHOOD	SUPER STORE	$4.20	1.25%	$4.82										$55,900	36,929
	COMM./REGIONAL	WAREHOUSE	$5.17	1.25%	$6.80	X				X	X	X	X		$15,000	35,000
	NEIGHBORHOOD	SUPER STORE	$21.70	2.00%	$21.70	X	X			X	X				$51,000	35,000
	NEIGHBORHOOD	SUPER STORE	$5.09	1.25%	$6.38										$39,600	33,128
		CONVENTIONAL	$8.00	2.00%									X			33,000
	NEIGHBORHOOD	SUPER STORE	$2.37	1.25%	$8.39										$82,800	32,310
		CONVENTIONAL	$7.50	2.00%					X				X			29,000
	NEIGHBORHOOD	CONVENTIONAL	$4.40	1.00%	$8.77										$20,275	26,655
	NEIGHBORHOOD	WAREHOUSE	$4.75	1.50%	$1.50					X						26,000
	NEIGHBORHOOD	CONVENTIONAL	$2.20	1.50%	$11.90	X	X			X	X				$40,000	26,000

TABLE 34

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
	FREE STANDING	CONVENTIONAL	$10.00	2.00%	$10.00											25,000
	NEIGHBORHOOD	CONVENTIONAL		1.25%		X		X			X	X				23,000
	NEIGHBORHOOD	WAREHOUSE	$4.50	1.50%	$1.50			X		X	X				$1,500	22,000
	FREE STANDING	CONVENTIONAL	$3.00	1.00%	$3.20										$18,000	22,000
		CONVENTIONAL	$0.21	1.25%	$0.70						X			X	$8,400	21,000
	FREE STANDING	CONVENTIONAL	$4.50	1.50%	$1.50	X					X			X	$1,800	20,000
	NEIGHBORHOOD	CONVENTIONAL	$5.15	1.50%	$1.50				X		X			X	$1,800	19,800
	NEIGHBORHOOD	CONVENTIONAL	$4.00	1.50%	$1.50	X	X	X		X	X	X				15,000
	FREE STANDING	CONVENTIONAL	$10.00	1.75%	$10.00										$0	13,000
	NEIGHBORHOOD	CONVENTIONAL	$6.00		$6.00						X	X		X	$12,000	12,000
	FREE STANDING	CONVENTIONAL	$0.25	1.50%	$0.39											11,500
	NEIGHBORHOOD	CONVENTIONAL		0.60%		X		X			X	X				9,000
	FREE STANDING	CONVENTIONAL	$6.00		$6.00			X	X	X					$0	7,500
	FREE STANDING	CONVENTIONAL	$5.00		$5.00										$0	7,000
	FREE STANDING	CONVENTIONAL	$4.00		$4.00										$0	6,500
	FREE STANDING	CONVENTIONAL	$6.12	0.00%	$7.45										$0	4,700
	BUSINESS DIST.	CONVENTIONAL	$6.00		$6.00			X	X	X					$0	3,000
AVERAGE			$7.04	1.26%	$7.63										$28,103	36,190
ATLANTIC	COMM./REGIONAL	SUPER STORE	$2.77	0.00%	$13.83						X			X	$31,362	37,962
	NEIGHBORHOOD	CONVENTIONAL	$2.62	1.50%	$13.11						X				$0	34,328
	COMM./REGIONAL	SUPER STORE	$2.37	1.25%	$5.53										$38,062	33,000
	COMM./REGIONAL	CONVENTIONAL	$5.40		$5.40	X					X	X			$44,240	32,900
	COMM./REGIONAL	CONVENTIONAL	$1.82	1.50%	$14.40	X					X			X	$115,671	32,400
	COMM./REGIONAL	CONVENTIONAL	$3.36	1.50%	$25.12		X				X			X	$73,731	31,859
	NEIGHBORHOOD	SUPER STORE	$4.19	1.25%	$6.32			X	X	X	X	X	X	X	$46,341	31,154
	NEIGHBORHOOD	CONVENTIONAL	$5.81		$5.81	X					X	X			$18,960	30,800
	COMM./REGIONAL	CONVENTIONAL	$5.25	1.50%	$26.25						X			X	$36,664	30,798
	COMM./REGIONAL	CONVENTIONAL	$5.22		$5.22	X					X	X				30,500
	COMM./REGIONAL	CONVENTIONAL	$2.65	1.50%	$19.50	X					X			X	$33,759	30,458

TABLE 34

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
	COMM./REGIONAL	CONVENTIONAL	$6.08		$6.08	X					X	X			$45,820	30,300
	COMM./REGIONAL	CONVENTIONAL	$7.90	1.50%	$39.50	X					X		X	X	$28,440	29,975
	COMM./REGIONAL	CONVENTIONAL	$5.48		$5.48	X					X	X			$79,000	28,300
	NEIGHBORHOOD	CONVENTIONAL	$3.95	1.00%	$3.95		X	X	X		X	X	X	X	$37,749	28,096
	COMM./REGIONAL	CONVENTIONAL	$2.54	1.50%	$21.39						X			X	$2,639	27,724
	NEIGHBORHOOD	CONVENTIONAL	$4.52		$4.52	X					X	X			$16,590	25,690
	FREE STANDING	CONVENTIONAL	$4.43	0.00%	$22.17	X					X				$0	25,680
	COMM./REGIONAL	CONVENTIONAL	$6.75	2.00%	$33.76	X		X			X			X	$77,961	25,500
	COMM./REGIONAL	CONVENTIONAL	$2.61	1.50%	$17.85		X			X	X		X	X	$89,270	25,402
	NEIGHBORHOOD	CONVENTIONAL	$5.53	1.50%	$27.65	X					X			X	$27,295	24,987
	COMM./REGIONAL	CONVENTIONAL	$1.60		$1.60	X					X	X			$37,920	24,000
	COMM./REGIONAL	CONVENTIONAL	$4.82		$4.82	X					X	X			$56,090	24,000
	COMM./REGIONAL	CONVENTIONAL	$2.75		$2.75	X					X	X			$37,130	23,900
	NEIGHBORHOOD	WAREHOUSE	$4.74	1.00%	$5.53					X	X		X	X		22,000
	COMM./REGIONAL	CONVENTIONAL	$3.56	1.25%	$19.82	X					X			X	$50,419	21,475
	NEIGHBORHOOD	CONVENTIONAL	$2.70		$2.70	X					X	X			$9,480	21,000
	NEIGHBORHOOD	CONVENTIONAL	$0.55		$0.55	X					X	X				20,300
	FREE STANDING	CONVENTIONAL	$0.54		$0.54	X					X	X				19,000
	COMM./REGIONAL	CONVENTIONAL	$2.87		$2.87	X					X	X			$19,750	16,000
	COMM./REGIONAL	CONVENTIONAL	$9.20	2.00%	$9.20	X					X	X			$55,300	15,600
	COMM./REGIONAL	CONVENTIONAL	$4.42	0.00%	$22.12	X					X				$0	15,467
	NEIGHBORHOOD	CONVENTIONAL	$2.77	1.00%	$3.95					X	X		X	X		12,000
	NEIGHBORHOOD	CONVENTIONAL	$3.56	0.00%	$17.78						X				$0	11,537
	FREE STANDING	CONVENTIONAL	$2.46	1.40%	$15.35	X									$0	7,722
	FREE STANDING	CONVENTIONAL	$2.37	0.00%	$11.85										$0	6,871
	FREE STANDING	CONVENTIONAL	$6.07		$6.07	X					X	X				6,250
	FREE STANDING	CONVENTIONAL	$3.06		$3.06	X					X	X				6,200
AVERAGE			$3.93	1.11%	$11.93										$35,795	23,714
ONTARIO	NEIGHBORHOOD	COMBINATION	$6.32													69,353

TABLE 34

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
	COMM./REGIONAL	SUPER STORE	$6.88	1.50%	$6.88	X				X	X	X	X	X	$182,490	52,138
	COMM./REGIONAL	SUPER STORE	$12.24	1.50%	$13.88	X					X	X		X	$49,770	50,737
	NEIGHBORHOOD	SUPER STORE	$2.76	2.00%	$6.49	X				X	X			X	$61,620	48,696
	COMM./REGIONAL	SUPER STORE	$4.74	1.50%	$6.02	X				X	X	X	X	X	$66,123	40,160
	COMM./REGIONAL	SUPER STORE	$8.29	1.50%	$8.29	X				X	X	X	X	X	$60,435	39,502
	NEIGHBORHOOD	SUPER STORE	$9.24												$36,340	39,000
	NEIGHBORHOOD	SUPER STORE	$5.70	1.50%	$5.93	X				X	X	X	X	X	$33,180	35,917
		SUPER STORE	$8.30	1.50%	$8.30						X		X	X		35,000
	NEIGHBORHOOD	SUPER STORE	$1.04	0.00%	$1.04	X					X				$58,460	34,713
	NEIGHBORHOOD	SUPER STORE	$6.30												$21,330	34,540
	NEIGHBORHOOD	SUPER STORE	$9.10	1.50%	$9.50	X				X	X	X	X	X	$29,230	33,665
	NEIGHBORHOOD	SUPER STORE	$2.81													33,544
	NEIGHBORHOOD	SUPER STORE	$6.12		$6.12			X	X	X	X	X	X	X	$28,118	33,102
	NEIGHBORHOOD	SUPER STORE	$7.17													31,000
	NEIGHBORHOOD	SUPER STORE	$1.76	1.00%	$3.71	X	X			X	X	X	X	X	$4,108	30,376
		CONVENTIONAL	$6.32	1.50%	$6.32						X		X	X		30,000
	NEIGHBORHOOD	CONVENTIONAL	$8.67												$26,544	29,865
	NEIGHBORHOOD	CONVENTIONAL	$3.40	0.00%	$3.40	X				X	X		X	X	$24,016	29,792
	NEIGHBORHOOD	CONVENTIONAL	$4.19	1.50%	$4.32	X					X			X	$29,230	28,878
	NEIGHBORHOOD	CONVENTIONAL	$4.08	1.50%	$4.08	X					X	X	X	X	$28,440	28,452
	COMM./REGIONAL	CONVENTIONAL	$1.68	1.50%	$1.86	X				X	X		X	X	$69,520	22,307
	NEIGHBORHOOD	CONVENTIONAL	$3.74	1.50%	$4.49	X					X			X	$54,510	21,317
	COMM./REGIONAL	CONVENTIONAL	$5.53	1.35%	$5.53			X	X	X	X	X	X	X	$59,743	21,162
	FREE STANDING	CONVENTIONAL	$0.49	0.00%	$0.49	X					X				$0	21,014
		WAREHOUSE	$4.54	1.50%	$4.54						X		X	X		20,000
	FREE STANDING	CONVENTIONAL	$0.66	0.00%	$0.66	X					X				$0	19,030
	NEIGHBORHOOD	CONVENTIONAL	$0.72		$0.72										$13,478	17,500
	NEIGHBORHOOD	CONVENTIONAL	$4.67		$4.67										$4,051	15,850
	NEIGHBORHOOD	CONVENTIONAL	$5.53	1.50%	$6.60	X					X			X		15,000
	FREE STANDING	CONVENTIONAL	$5.01	1.50%	$15.40	X					X				$0	14,975
	NEIGHBORHOOD	CONVENTIONAL	$7.39												$18,170	14,293
	FREE STANDING	CONVENTIONAL	$8.06	1.50%	$8.06	X					X			X		12,400

TABLE 34

OWNERSHIP/LEASE ARRANGEMENT FOR EXISTING STORES

REGION	LOCATION OF SUPERMARKET	TYPE OF SUPERMARKET	MINIMUM RENT PER SQUARE FOOT	RENT OVERAGES AS A PERCENT OF SALES	ESTIMATED TOTAL RENT INCLUDING OVERAGES AFTER FIVE YEARS	SERVICES PROVIDED BY THE LANDLORD -- INSTALLATION OF HEATING/AIR CONDITIONING	MAINTENANCE OF HEATING/AIR CONDITIONING	TAXES	INCREASES IN TAXES	INSURANCE	PARKING INSTALLATION	SPRINKLER SYSTEM	SECURITY	SNOW REMOVAL	ANNUAL COMMON AREA CHARGES	TOTAL SIZE OF STORE
	NEIGHBORHOOD	CONVENTIONAL	$4.58	1.50%	$4.58	X				X			X			10,900
	NEIGHBORHOOD	CONVENTIONAL	$4.83													10,521
	BUSINESS DIST.	CONVENTIONAL	$3.18	0.00%	$3.18	X				X					$0	10,458
	FREE STANDING	CONVENTIONAL	$5.81	1.50%	$5.93	X				X			X			5,500
AVERAGE			$5.19	1.20%	$5.55										$36,881	28,126
QUEBEC	NEIGHBORHOOD	WAREHOUSE	$6.32	1.00%	$6.32		X		X	X		X	X			57,079
	COMM./REGIONAL	SUPER STORE	$6.64	1.00%	$6.64	X				X					$131,436	54,724
	COMM./REGIONAL	WAREHOUSE	$8.76	1.50%	$9.59		X			X		X	X			46,000
	COMM./REGIONAL	SUPER STORE	$4.57	1.50%	$11.74		X			X		X	X			40,000
	NEIGHBORHOOD	CONVENTIONAL	$3.97	1.50%	$8.29		X			X		X	X			26,859
	NEIGHBORHOOD	WAREHOUSE	$6.05	0.00%	$6.05	X				X					$53,893	26,854
	COMM./REGIONAL	CONVENTIONAL	$4.20	1.00%	$4.20	X				X					$25,043	23,800
	NEIGHBORHOOD	CONVENTIONAL	$4.65	1.00%	$4.65	X				X					$29,072	19,800
	FREE STANDING	CONVENTIONAL	$6.72	1.25%	$7.11											16,429
	NEIGHBORHOOD	CONVENTIONAL	$8.83	1.25%	$8.83		X		X	X		X	X			15,628
	FREE STANDING	CONVENTIONAL	$5.80	0.00%	$5.80	X				X					$18,012	14,100
AVERAGE			$6.05	1.00%	$7.20										$51,491	31,025
AVERAGE FOR ALL REGIONS			$5.28	0.92%	$7.53										$23,991	32,067

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FACTS ABOUT STORE DEVELOPMENT, 1993

FOOD MARKETING INSTITUTE

FACTS ABOUT STORE DEVELOPMENT, 1992

This survey tracks changes and developments in new store construction, store remodelings as well as rent and leasing information for all stores. We ask that you answer as many questions as possible. All individual data are held in strictest confidence. If you have any questions, please contact Mike McCarthy in the FMI research department at 202-429-8277or Monika Simon at CCGD, 514-982-0267.

GENERAL INSTRUCTIONS

A. Please complete all sections of the survey that apply to your company. All data should be for the calendar year 1992.

B. A supermarket is defined as a retail food store with at least $2 million in annual sales.

I. GENERAL COMPANY INFORMATION

1. What will be your company's approximate annual food sales in 1992? (Please check the appropriate category)

❒ Under $10 million
❒ $10 million to $30 million
❒ $31 million to $100 million
❒ $101 million to $250 million
❒ $251 million to $500 million
❒ $501 million to $999 million
❒ $1 billion to $3 billion
❒ Over $3 billion

II. STORE REMODELINGS

2. How many stores underwent a major remodeling* in 1992? ___ ___ ___ stores

3. What was the schedule for your typical supermarket that underwent a major remodeling in 1992?

a. ___ ___ years from first opening to present remodeling

b. ___ ___ years from last major remodeling to present remodeling

4. What was the average total capital investment per supermarket for major remodeling (for total store area)?

$___ ___ ___ ___ ___ ___
total investment

5. What was the average total capital investment per square foot for major remodeling?

$___ ___ ___ ___ ___
per sq. ft.

* A MAJOR REMODELING IS ONE THAT COST AT LEAST $50,000

PLEASE FILL IN THE INFORMATION BELOW AND TURN THE PAGE TO COMPLETE THE REST OF THE SURVEY

NAME _____

TITLE _____

TELEPHONE _____

6. How many of your remodels added any of the following departments that were not in the store before? (If none, please put a "0")

	Number of Stores		Number of Stores
a. Pharmacy	___ ___ ___	f. Greeting cards	___ ___ ___
b. Service bakery/deli	___ ___ ___	g. Photo centers	___ ___ ___
c. Scratch/bake-off bakery	___ ___ ___	h. Service-seafood	___ ___ ___
d. Prepared foods	___ ___ ___	i. Floral/Plant shop	___ ___ ___
e. Expanded GM/HBC sections	___ ___ ___	j. Wine	___ ___ ___

PLEASE GO TO QUESTION 7, NEXT COLUMN

7. How many of your remodels involved adding additional square feet to the store?

___ ___ ___ remodels

8. What was the average number of square feet added to a store in your remodels?

___ ___,___ ___ ___ sq. ft.

PLEASE GO TO QUESTION 9, BELOW

III. GENERAL STORE INFORMATION

9. Please complete the following table for each type of supermarket your company had in operation as of December 31, 1992 (A supermarket is a food store with annual sales of at least two million dollars):

TYPE OF STORE (see definitions to the right)	Number of Supermarkets in Operation on December 31, 1992	Average Number of Years Since Supermarkets Last Major Remodel	Number of Supermarkets Newly Constructed in 1992	Number of Supermarkets Closed in 1992	Number of Supermarkets Your Company Acquired in 1992
A. Conventional Supermarket	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number
B. Super Stores	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number
C. Combination Stores	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number
D. Warehouse Stores	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number
E. Other	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number
F. TOTAL SUPERMARKETS	___ ___ ___ number	___ ___ years	___ ___ ___ number	___ ___ ___ number	___ ___ ___ number

STORE TYPES

Even though your company's definitions of store type may differ from the definitions that follow, we ask that you use the formats as defined here. This will help keep the store type data consistent for industry wide information.

A = Conventional Supermarket: a supermarket with total store area of 30,000 square feet or less.

B = Superstore: a supermarket with more than 30,000 square feet in total area and offering expanded selection of non-foods. Extensive service departments are also offered.

C = Combination Store: same as a superstore but the **percentage of non-food is 25 percent or more** of the total.

D = Warehouse Store: a supermarket that uses utilitarian fixtures and emphasizes lowered prices at the expense of customer service.

E = Other

IV. NEW STORE DEVELOPMENT

10. Following is a chart requesting information on stores that were newly constructed in 1992. If your firm has constructed a number of a similar format, enter this information in one column and indicate the number of stores described per column.

	Store/Prototype #01	Store/Prototype #02	Store/Prototype #03	Store/Prototype #04
Region where store(s) is located (One region per column)				
Number of new stores	___ ___ ___ supermarkets	___ ___ ___ supermarkets	___ ___ ___ supermarkets	___ ___ ___ supermarkets
Location of Store (please circle)	A B C D	A B C D	A B C D	A B C D
Type of Store (please circle)	A B C D E	A B C D E	A B C D E	A B C D E
Total square feet per store	___ ___ ___ ___ sq. ft.	___ ___ ___ ___ sq. ft.	___ ___ ___ ___ sq. ft.	___ ___ ___ ___ sq. ft.
Square feet of selling area (customer area) per store	___ ___ ___ ___ sq. ft.	___ ___ ___ ___ sq. ft.	___ ___ ___ ___ sq. ft.	___ ___ ___ ___ sq. ft.
CONSTRUCTION COSTS per sq. ft.:				
A. Equipment, fixture and decoration costs	$ ___ ___ ___ per sq. ft.	$ ___ ___ ___ per sq. ft.	$ ___ ___ ___ per sq. ft.	$ ___ ___ ___ per sq. ft.
B. Building (give an estimate if exact costs are unknown; do not include the cost of the land or parking lot)	$ ___ ___ ___ per sq. ft.	$ ___ ___ ___ per sq. ft.	$ ___ ___ ___ per sq. ft.	$ ___ ___ ___ per sq. ft.
TOTAL CONSTRUCTION COSTS (Sum of A and B)	$ ___ ___ ___ ___ per sq. ft.	$ ___ ___ ___ ___ per sq. ft.	$ ___ ___ ___ ___ per sq. ft.	$ ___ ___ ___ ___ per sq. ft.
Average Cost of Opening Inventory	$ _____	$ _____	$ _____	$ _____
Please indicate the number of stores of each prototype which contained the following departments/services				
a. Pharmacy	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___
b. Service bakery/deli	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___
c. Scratch/bake-off bakery	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___
d. Prepared foods	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___
e. Video rentals	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___
f. Greeting cards	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___
g. Photo centers	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___
h. Service seafood	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___
i. Floral/Plant shop	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___
j. Wine	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___

REGION

Please use the following abbreviations to describe the regions in which your supermarkets are located.

NE = North East
SE = South East
MA = Mid-Atlantic
ENC = East North Central
WNC = West North Central
WSC = West South Central
M = Mountain
P = Pacific

LOCATION OF STORE

A = **Community or Regional Shopping Center:** a planned center dominated by one or more large department or discount stores

B = **Neighborhood Shopping Center**: a planned center with more than one store but dominated by the supermarket.

C = **Free Standing**: a store located by itself or in an unplanned shopping area.

D = **City Store**: a store located in a heavily populated urban area.

V. LEASING ARRANGEMENTS

11. This chart requests leasing information on all new and existing stores. Please list one store per line. If your company leases many stores, please give a representative sample of those stores. Note the instructions for geographic region, store type and store location on the previous pages. Please write in the appropriate letter for these categories. Instructions for rent, overages and services are to the right.

FACTUAL INFORMATION	Region	Location of Supermarket(s)	Type of Supermarket(s)	RENT — Please give the rent per square foot: Minimum Rent per square foot	Rent Overages as a percent of sales	Expected Total Rent per square foot including Overages after five years	Annual Common Area Cha ges	SERVICES PROVIDED BY THE LANDLORD — Please check: Installation of heating air conditioning system	Maintenance of heating air conditioning system	Taxes	Increases in taxes	Insurance	Installation of customer parking	Sprinkler system	Security	Snow Removal	TOTAL SIZE OF STORE	Circle New or Existing
01				$	%	$	$										sq. ft.	N E
02				$	%	$	$										sq. ft.	N E
03				$	%	$	$										sq. ft.	N E
04				$	%	$	$										sq. ft.	N E
05				$	%	$	$										sq. ft.	N E
06				$	%	$	$										sq. ft.	N E
07					%	$	$										sq. ft.	N E
08				$	%	$	$										sq. ft.	N E
09				$	%	$	$										sq. ft.	N E
10				$	%	$	$										sq. ft.	N E
11				$	%	$	$										sq. ft.	N E
12				$	%	$	$										sq. ft.	N E
13				$	%	$	$										sq. ft.	N E
14				$	%	$	$										sq. ft.	N E
15				$	%	$	$										sq. ft.	N E
16				$	%	$	$										sq. ft.	N E
17				$	%	$	$										sq. ft.	N E
18				$	%	$	$										sq. ft.	N E

RENT, OVERAGES AND SERVICES

Minimum Rent: the minimum rent per square foot per year for the total store area.

Overages: the rent overages charged as a percentage of sales.

Expected total rent: give your total rent per square foot including overages. If you are describing a new store please give an estimate of the expected rent after five years of operation.

Services provided by the landlord: place a check next to each of the services which are provided by the landlord.

Thank you for your time. Your participation and cooperation are greatly appreciated. A complimentary copy of the completed report will be sent to your attention.

Michael McCarthy
Research Department
Food Marketing Institute
1750 K Street, N.W.
Washington, DC 20006

FACTS ABOUT STORE DEVELOPMENT, 1992

Dear Supermarket Operator:

As part of FMI's assessment of the industry's store development activity in 1992, we ask you to take a moment to answer the questions below. Please refold the card with the postpaid side out and return it to FMI.

We look forward to hearing from you. Thank you for your assistance.

Sincerely,

Michael McCarthy
Manager, Research

NUMBER OF SUPERMARKETS

1. **How many supermarkets will your company have in operation as of December 31, 1992?**
   (A supermarket is a food store with annual sales of at least $2 million) _____

2. **Of those supermarkets in question 1, how many will your company operate:**

   * That were acquired from another company in 1992? _____

   * That were newly constructed in 1992? _____

   * Underwent a major remodeling (a remodeling that cost at least $50,000 in 1992?) _____

   * Underwent minor improvements/upgrades etc. that cost under $50,000 in 1992? _____

3. **How many supermarkets will your company have closed in 1992?** _____

Name _____

Title _____

Company _____

Telephone _____

FMI
FOOD MARKETING INSTITUTE

Thank You

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